

***For Immediate Release***

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## **Loring Ward Releases Whitepaper on Three Hurdles to Implementing an SRI Mutual Fund Strategy**

### ***A New Perspective on Socially Responsible Investing***

San Jose, Calif. – February 10, 2012 – Loring Ward announced the publication of a new white paper for investors interested in Socially Responsible Investing (SRI): [Three Hurdles to Implementing an SRI Mutual Fund Strategy](#).

Based on in-depth, original research, including the work of behavioral finance pioneer and Loring Ward [Investment Committee](#) member, Professor Meir Statman, the whitepaper offers insights for investors who are looking for ways to invest without sacrificing their beliefs and values.

“For many investors, it’s just not enough to do well with their investments from a financial perspective,” said the whitepaper’s co-author, Sheldon McFarland, Loring Ward’s Vice President of Portfolio Strategy. “They also want to know that the companies they invest in are not involved in activities that run counter to their values.”

The whitepaper looks at the three main obstacles investors need to overcome in order to incorporate SRI investing into their long-term financial plan:

1. The underperformance risks of active management
2. Concentration risk
3. Management and turnover expenses.

“SRI strategies have a reputation for lowering investors’ returns significantly,” McFarland notes. “Our research found the opposite—that SRI investors could invest according to their values *and* enjoy potential market returns.”

### **About Loring Ward**

Since 1990, Loring Ward (LWI Financial Inc.) has provided Investment Management, Business Management and Practice Development to a select group of independent financial advisors and their clients.

Headquartered in San Jose, California, Loring Ward is dedicated to bringing science, reason and innovation to wealth management, with solutions tailored to the unique requirements of successful individuals, small businesses and institutions. Loring Ward's Structured Investing philosophy combines more than eight decades of market data, Nobel Prize-winning academic research and the latest discoveries in behavioral finance. As of 2/12, Loring Ward has almost \$7 billion in assets under management. For more information, please visit

<http://www.loringward.com>.

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