

Let Your Values Guide Your Investments

Navigate Financial helps you align your portfolio with your values

Socially responsible investing (SRI) is an approach to investing that enables you to develop an investment portfolio that reflects your personal, moral, social, and environmental values.

By excluding certain types of investments from your portfolio, you can pursue your financial goals while ensuring your personal investment decisions have a positive impact on our community and the world around us.

Navigate Financial makes it possible for you to customize your portfolio to reflect your personal values. We can help you design an investment portfolio that can exclude specific sectors, such as companies that are involved in developing military weapons, have poor environmental records, or are involved in animal testing. You also have the ability to exclude an unlimited number of individual securities from your portfolio.

In essence, we enable you to put your money where your heart is as you invest intelligently to meet your goals.

We can help you:

- Implement investment strategies to help increase and protect your wealth;
- Screen out companies and industries that you do not want to support;
- Minimize taxes, while maximizing the money you save and invest for your future;
- Make wise decisions about your retirement accounts and plan your distribution strategy as you near retirement (or now that you are retired);
- Help you put effective protection plans in place to secure your financial future against the unexpected; and
- Preserve, protect and continue to grow your assets after retirement to ensure you'll live comfortably and leave a lasting legacy of financial security for your loved ones.



NAVIGATE FINANCIAL
Charting Your Journey

Your needs come first

At Navigate Financial, we begin each client relationship by seeking to understand what makes you unique. We listen to our clients. We seek to understand your goals and provide financial solutions based on your core values and what is truly important to you.

To help provide solutions to your financial needs, we gather significant facts about your financial situation and goals, analyze this data, and prepare a financial profile report which includes recommendations on how to meet your personal financial goals. Then, we tailor our services to your needs.

Your Socially Responsible Investing Portfolio can employ any of these 16 social screens:

- Adult Entertainment
- Alcohol
- Animal Welfare
- Contraceptives/Abortifacients
- Diversity of Company's Board of Directors
- Environmental Performance
- Firearms
- Gambling
- Human Rights
- Labor Relations/Workplace Issues
- Nuclear Power
- Pork
- Predatory Lending
- Stem Cell Research
- Tobacco
- Weapons/Military

In addition, you can exclude any individual companies you wish.

Objective and independent advice

At Navigate Financial, we are independent and objective. We strongly believe the most effective advisor/client relationship results when there is no bias due to compensation arrangements with outside parties.

As such, we have no proprietary investment products to recommend and no vested interest in promoting a particular product or service. Our only interest is to have your portfolio meet your financial objectives, so you're always assured of unbiased recommendations and advice.

Helping you attain long-term financial success

If you are among the growing number of investors who want to integrate your personal values and community concerns with your investment decisions, Navigate Financial can help you customize your portfolio accordingly.

We would be happy to meet with you to discuss your investment needs and objectives. Contact us to learn more about how we can help you simplify your financial life through comprehensive and personalized financial strategies.



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Securities and advisory services offered through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser.

Investments in a Custom Style Portfolio Program involve investment risk, including possible loss of principal amount invested. Investment return and principal value may fluctuate so that the investment, when redeemed, may be worth more or less than the original investment.

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