

# Faith and Family Values

**Trinity Fiduciary Partners** has developed a proprietary faith and family values screening methodology that is used to evaluate companies for investment. The screening criteria is reviewed by Trinity's independent advisory board comprised of national leaders in faith-based and social justice academics, theology, and outreach. The data and analytics supporting this methodology is provided through a partnership with

**IW Financial**, a leading provider of faith based research to investors. The Faith and Family Values evaluations utilize nearly three hundred data elements across four central themes.

- Life and family
- Human rights and economic justice
- Environment
- Corporate governance

## Life and Family

Supporting life and family is a core religious value and the foundation of the FFV evaluation process. The FFV Life and Family evaluation looks at a range of criteria ranging from manufacturing involvement in abortion and contraception to sponsoring groups that seek to undermine the sanctity of family life. Our evaluation excludes companies involved in certain activities.

- Abortion
- Adult Entertainment
- Contraception

- Embryonic Stem Cell or Fetal Tissue Research
- High levels of environmental fines
- Nuclear Weapons and Landmines

In addition we look at both the positive and negative aspects of a company's performance in certain areas.

- Adult Stem Cell Research (positive)
- Gambling (negative)
- Tobacco (negative)

## Human Rights and Economic Justice

Human rights and economic justice are important issues for faith based investors. The FFV Human Rights and Environmental Justice evaluation examines a variety of human rights and workforce criteria. In our evaluations we look at both positive and negative aspects of a companies policies and performance.

Categories we look at are:

- Community Involvement
- Diversity
- Human Rights
- Workforce

## Environment

Environmental stewardship has become increasingly important to faith-based investors. The FFV environmental evaluation looks at both positive and negative aspects of a company's policies and

performance across a range of categories.

- Environmental Management
- Environmental Performance

## Corporate Governance

Corporate Governance factors can provide important insight into how well a company serves its shareholders and stakeholders as well as indicate risks. The FFV Governance evaluation looks at a variety of board issues and the relationship between the board and the CEO. In our evaluations we look at both positive and negative aspects of a companies

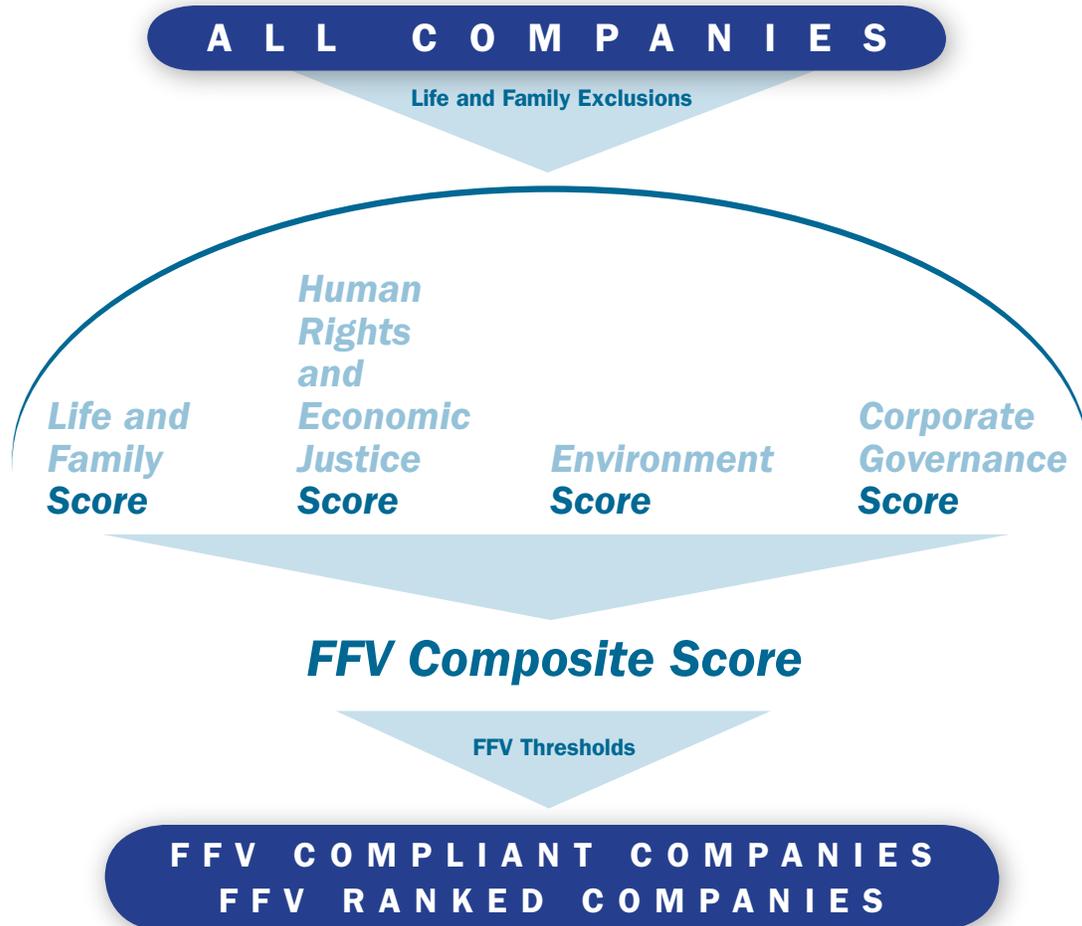
policies and performance.

- Board Accountability
- Board Independence
- CEO Compensation
- Political Policies
- Takeover Defenses

# The FFV Scorecard® Process

The **FFV Scorecard** process begins with analyzing the criteria for each theme or pillar.

Companies that fail on the exclusionary criteria in the Life and Family pillar will not be considered for investment. Clients may request additional exclusionary criteria. The remaining companies are then compared based on the criteria within each theme. Within each theme, a comparative rating or score is developed for each company. The company rating for each theme is then combined to create a total score.



## FFV Advisory Board

**Trinity Fiduciary Partners** has convened an advisory board of respected Catholics to provide input on the Faith and Family Values Scorecard used to evaluate companies for investing. Our goal is define Catholic investing in order to unite Catholics in the effort to influence society, and especially corporations, to be responsible citizens by respecting the dignity of human life, supporting and protecting families, and safeguarding the environment.

## Advisory Board Members

**Candy S. Hill** Vice President for Social Policy and Government Affairs,  
*Catholic Charities USA*

**Patrick Kelly** Vice President for Public Policy for the Knights of Columbus  
**Deirdre McQuade** Director of Planning and Information for the U.S. Conference  
*of Catholic Bishops' Secretariat for Pro-Life Activities*

**Mark Randall** Vice President of Development, Wyoming Catholic College

**Dr. John Rziha** Professor of Theology, Benedictine College

**Reverend Larry Snyder** President of Catholic Charities USA

**Monsignor Stuart Swetland** Archbishop Harry J. Flynn Endowed Chair  
*for Christian Ethics, Mount St. Mary's University*