Goodfunds
WEALTH MANAGEMENT

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Sustainable and responsible investing since 1986

www.goodfunds.com

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Dear client,

I founded what is now Goodfunds Wealth Management, 25 years ago from humble beginnings and one client. I was of course the first client. Even before that, my own money was in the SRI funds of the day. Like a good chef, I usually taste before serving.

It was clear that a transition from the misaligned financial system to one that serves people and planet would require earnest endeavor, but would certainly be worthwhile. Merely acting as a cog in the economic wheel was not going to make a satisfying life. I had to do something with my days that would make a difference and leave this place a little better.

In those early days, what I lacked in staff and resources I made up for in hard work, dedication, and above all commitment to diligent client service. This all is still the case, but there are more of us. Alice Smith, CHARTERED RETIREMENT PLANNING COUNSELOR℠, coordinates client financial planning projects. And Ryan Jones-Casey, MBA, ACCREDITED ASSET MANAGEMENT SPECIALIST℠, provides key account services and client communications. In addition, there are numerous colleagues out there who I trained or inspired over the years.

Over the years, we evolved our service and ourselves in order to maintain leadership in this arena. We have grown, we downsized, and grew again, but in its essence the mission has remained. That mission is to help citizen-investors get their money involved in sustainable and responsible investing strategies to help the world, while earning competitive returns. And for us, to also earn a living while we were at it.

Despite the cyclical economy and volatile financial markets over the years, we were able to help hundreds of citizens align their investing and harmonize their financial planning decisions. Of course, successfully managing any business inevitably comes with its challenges. We've been fortunate, especially compared to the countless colleagues we've watched over the years fail, quit, get fired, or flail about from firm to firm.

But we did not succeed on our own. For that success, we are *most* grateful to each of the visionary long-time committed clients which are the foundation of our practice, *and* for those whom have joined us in recent years. We've also been fortunate to have selected solid business partners and allied service providers early on. Those key partners and services include, and this is only an abridged list, KMS Financial Services, First Affirmative, Schwab Institutional, Calvert, Pax, and the many other SRI mutual funds and managers who diligently steward our own and our clients' money.

We feel a great deal of gratitude for our success so far and most of all we appreciate the clients and partners that have been on this journey with us.

Thank you and warmest regards,