



## Professional Focus and Services

Individuals, families, foundations, and endowments enjoy state-of-the-art sustainable and responsible investment management services through Eric Smith and his colleagues at Goodfunds Wealth Management. Since 1986, their office has specialized in serving investors who wish to obtain competitive returns while advancing a better world for all.

Client services are diligently coordinated with a competent team of professionals including money managers, proxy vote services, shareholder advocacy specialists, charitable giving account services, community investing management, insurance consultants, tax advisers, and estate planning specialists.

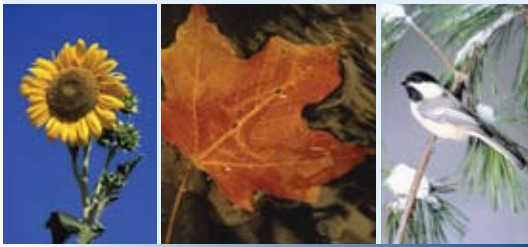
Recent academic and institutional studies show that by integrating sustainability, responsibility, and transparency criteria, prudent investors can gain an advantage managing diversified portfolios. The strategies coordinated for clients include the following:

- Integrating environmental, social, and governance criteria along with traditional financial investment management. These time-tested, long-term strategies can support a better investment experience.
- Shareholder advocacy activities which aim to address human rights abuses, climate crisis, and other challenges of the day.
- Proxy voting policies and services that support sensible environmental, social, and governance shareholder resolutions.
- Allocating a portion of portfolios to community investment notes funding microfinance, affordable housing, small business, fair trade, and job creation.

Goodfunds Wealth Management services are ideal for investors who wish to delegate these tasks to an experienced provider offering a financially sound fiduciary process.

### Guiding Principles

- Live and act according to your deeply held values.
- Remember the natural world and learn from it.
- Embrace interconnectedness, interdependence, and social responsibility.
- Support a peaceful fair economy that values and respects all peoples and ecological processes. Champion human rights through tolerance, diversity, and community.
- Protect and participate in political and economic democracy.



*Sustainable and responsible  
investing services since 1986.*

## Personal Notes/Fun Facts

When I began serving sustainability-minded and socially responsible investors in 1986, colleagues told me that it was a silly idea. They said, "Your clients are going to lose money, they'll earn less, it's ridiculous." Well, I stayed with my vision and let those people all do whatever it was they were doing. Now we see investors of all kinds and even some in the financial services world coming around. Will you join us?

We each now face the difficult decision between the old easy way out...or a wiser, sustainable and responsible path.

—Eric Smith



Investment advisory services and securities through KMS Financial Services, Inc. Member FINRA & SIPC. Eric Smith subscribes to a package of professional services offered by First Affirmative Financial Network, LLC. He is not an investment advisory representative of First Affirmative. First Affirmative is not an affiliate or subsidiary of KMS Financial Services, Inc. \*Goodfunds Wealth Management is the DBA name of Eric Smith's KMS branch office.

## Professional Affiliations

Since the campaign's inception, Mr. Smith has been a Social Investment Forum "Community Investing Achiever" (more than 1% of client assets in community investments). MMA Praxis Mutual Funds recognized him as a "Stewardship Investing Star." Calvert Foundation recognized Mr. Smith's work with the 2004 "Advisor of the Year" award for community investing, and First Affirmative Financial Network consistently awards his office for "outstanding service to socially conscious investors."

Mr. Smith is an investment advisory representative and registered representative with KMS Financial Services. KMS is an employee-owned regional financial services firm in Seattle with over 300 investment consultants. Through his affiliation with KMS, Eric coordinates client services and access to investment management platforms including [First Affirmative Financial Network, LLC](#). Eric is a member of First Affirmative's Advisory Board and is a minority (less than 5%) owner. He maintains custodial affiliations with Schwab Institutional and FOLIO-Advisor for client accounts. Professional memberships include [Social Investment Forum](#) (since 1986), [Green America Business Network](#), and the [Financial Planning Association](#).

## Education and Experience

Managing a successful financial services practice continuously since 1986, Mr. Smith has specialized in helping individuals, families, and institutions participate in the sustainable investing movement. He is a [CERTIFIED FINANCIAL PLANNER®](#) certificant and holds the [ACCREDITED INVESTMENT FIDUCIARY®](#) designation. Eric earned a Bachelor of Science in Business Administration from California State University Dominguez Hills in 1982. Before entering the financial services field he worked as an independent accounting auditor for six years.

## Community Involvement

Mr. Smith supports and volunteers for urban bicycling issues, urban organic gardening, sustainability programs, progressive politics, media, and social change arts. He served for a three-year term on the board of directors as treasurer of a community foundation that supports activist, community-based organizations working for social, economic, and environmental justice across the Northwest. In addition, he teaches classes, speaks on sustainable and responsible investing, and sponsors the various programs of the Social Investment Forum Foundation.