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Triple Play: Ways you can align investment portfolios with your personal morals

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Scott Mahoney

Triple Play is a weekly NJBIZ feature that asks top executives in New Jersey to talk about three things related to their industry.

Scott Mahoney is a Morristown-based senior portfolio management director and private wealth adviser with Morgan Stanley Private Wealth Management.

We asked Scott to identify the top three ways you can align investment portfolios with your personal values, morals and social concerns.

1

In order to better match your personal values with your investment objectives, it is important to first identify your priorities. Then, you can set personalized strategies and long-term objectives.

As with any investment, you should continually reassess to ensure your portfolio remains consistent with both your goals and values.

2

Consider slowly incorporating a sustainable investment strategy into your larger financial plan by allocating only a percentage of total investable assets. It may be a good idea, at least at the start, to stick with a single values-related issue, such as energy or sustainable agriculture.

3

Since faith tends to be another deeply held personal value, it follows that faith-based investing should be tailored to an individual's unique set of principles. Today, many faith-based investors are turning to a range of approaches that help align investments with their faith, without sacrificing financial returns. Among these approaches is values alignment or restriction screening, which can help an investor avoid businesses and investments that may be misaligned with their values.