

Financial Planning and Literacy

The resources in this section are compiled from several sources including: Changemakers, KLD Research & Analytics, Liberty Hill Foundation, Sharon Rich, and Stephen Viederman.

GENERAL NETWORKS & RESOURCES

Advisors in Philanthropy is an international network to unite foundations, financial advisors, donors and charitable organizations.

Association of African American Financial Advisors is a national association of African American financial advisors who provides financial and economic consulting services.

Association of Latino Professionals in Finance and Accounting is a national Latino professional association that provides financial and economic consulting services.

Certified Financial Planners is a professional regulatory organization that provides information about financial planning and how to choose a planner.

Confluence Philanthropy is a non-profit network of foundations, aiming to build capacity and provide technical assistance to enhance the ability of foundations to align the management of assets with organizational mission to promote environmental sustainability and social justice.

Family Office Exchange serves as a resource for families with wealth to help develop their understanding of wealth management issues and guides their selection of strategic advisors.

Financial Planning Association is a membership organization for the financial planning community.

International Association for Registered Financial Planners is an association of financial planners. Their website has articles on topics such as how advisors receive fees.

National Association of Estate Planners & Councils is a national organization of professional estate planners.

National Association of Insurance and Financial Advisors represents more than 70,000 insurance and financial advisors nationwide.

National Association of Personal Financial Advisors is a professional association of financial planners.

Pride Planners provides financial planning referral lists and resources for the LGBT community.

FINANCIAL LITERACY & PLANNING:

Here are a few resources to learn more about the financial industry and financial planning:

First Affirmative Financial Network publishes a financial planning handbook for socially responsible investors.

Heirs, Inc. provides a forum for beneficiaries of trusts.

Investor Words is a website with an extensive glossary of financial terms.

Investor Protection Trust provides “independent, objective information needed by consumers to make informed investment decisions.”

The Simple Dollar provides guidance on credit cards and how to manage them.

SOCIALLY RESPONSIBLE AND MISSION-RELATED INVESTING

Finding an investor who is committed to social change doesn't have to be something you do alone. There are a number of organizations designed to provide social investors with research, technical assistance, and other needed support. Family foundations can also practice a particular type of socially responsible investing by relating their endowment investments to their missions. Here are a few resources to learn more:

CDFI Coalition is a network of community development finance institutions.

CERES is a coalition of environmental, investor and advocacy groups focused on sustainability and corporate responsibility.

Confluence Philanthropy is a non-profit network of foundations, aiming to build capacity and provide technical assistance to enhance the ability of foundations to align the management of assets with organizational mission to promote environmental sustainability and social justice.

Co-op America is a national nonprofit organization that provides practical steps for

Investor's Circle is a social venture capital intermediary whose mission is to “support early-stage, private companies that drive the transition to a sustainable economy”.

Jessie Smith Noyes Foundation has been involved in mission related investing for years, and has a number of articles about their activities on their website.

National Federation of Community Development Credit Unions is an organization of Community Development Credit Unions.

Responsible Endowments Coalition is a diverse network of students and alumni from across the country dedicated to advancing socially and environmentally responsible investing in relation to college and university endowments.

Social Investment Forum is a national nonprofit organization providing research and educational programs on socially responsible investing.

Social Venture Network is a progressive business network that offers support for companies that value social justice, community, cooperation, diversity, education, sustainability and innovation.

SRI in the Rockies is an annual gathering of the socially responsible investment industry in the United States.

SRI World Group is a news, research and consulting firm that advises clients regarding sustainability and investment issues and corporate responsibility practices.

Ultimate Impact: Unifying an Investment Portfolio within a Donor Advised Fund, is a new paper about impact investing, put forth by RSF Social Finance, ImpactAssets, and Tides Center.

SHAREHOLDER ACTIVISM

As You Sow is a nonprofit organization dedicated to promoting corporate social responsibility.

Corporate Accountability International is a membership organization that takes on campaigns in shareholder activism to safeguard public health, human rights, and the environment from corporate abuse.

Business Ethics is a bimonthly magazine that promotes ethical business practices.

Interfaith Council on Corporate Responsibility is a coalition of religious communities working to promote corporate social responsibility.

Responsible Wealth is a national network of businesspeople, investors and affluent Americans who are concerned about deepening economic inequality and are working for widespread prosperity.

CONSUMER RESOURCES

Find.coop is a directory of cooperative and alternative economic entities throughout the United States.

Green Pages is the largest directory of qualified green businesses with over 25,000 products and services from 2,000 green companies.

Public Citizen is a national nonprofit consumer advocacy organization.

FINDING A FINANCIAL ADVISOR

Referrals are always the best option. Contact us directly for more information on our recommendations and tools for evaluating potential advisors.