

Shān Sutherland, Wealth Advisor at Simple Impact LLC, Discusses Gender Lens Investing

Shān Sutherland's company, Simple Impact LLC, offers ESG / SRI options for investing in women

CALABASAS, CALIFORNIA, USA, January 16, 2020 /EINPresswire.com/ -- "It is my humble opinion that gender equanimity in our financial structure is a cornerstone to continued trickle-down economic growth" says [Sutherland](#), "I vigilantly watch to identify strategies that share this investment premise."

Let's recap [ESG](#) = Environmental Social Governance and SRI= Social Responsible Investing.

This [article](#) describes a governance theme that focuses on women who lead companies. Every day I receive invitations for events across the country with notable women as keynote speakers and panelists. "It's been wonderful to witness event halls filled to standing room only", says Sutherland, " I'm surrounded by other inspired female executives and entrepreneurs wanting to know how they did it, what their challenges were, and how those lessons can be applied to their own path."

Here is a short, non-exhaustive list of investments that are easily accessible to US investors, to choose corporations who embrace women in boardroom diversity, leadership, and community stakeholders:

Symbol: SHE SPDR® SSGA is a gender diversity index EFT. It holds 178 stocks. It seeks to provide exposure to US companies that demonstrate greater gender diversity within senior leadership than other firms in their sector. Remember the fearless girl statue, whereby a young girl boldly stands off in front of the famous Wall Street bull statue? That was sponsored by State Street. As of Q3 2019 it had \$148 AUM. Its negative fund flows may indicate the increasing investment options available in the Gender Lens Investing space. As an index, the gross expense ratio is 0.20%

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Symbol: WIL Barclays Women in Leadership ETN. ETN or exchange-traded notes, are issued from Barclays bank from time to time. The return of these ETN's is linked to the performance of the Barclays women in leadership total return index. The index is designed to provide investors with exposure to US based companies that satisfy one or both of the gender diversity criteria of having a female chief executive officer or having at least



Shannon M. Sutherland, Financial Advisor Simple Impact LLC

25% females on the board of the directors, and satisfy certain market capitalization criteria. WIL has a set maturity date of July 15th, 2024. On this day investors will receive a cash payment in US dollars equal to the closing indicative value of the final valuation. Investor fees available on the prospectus.

Symbol: WOMN Tracks the Morningstar women's empowerment index which is designed to provide exposure to companies worldwide with strong policies and practices in support of women's empowerment and gender equality. WOMN donates all net

advisory profits from management fees to the YWCA providing an additional funding source to help them eliminate racism, empower women and promote peace, justice, freedom and dignity for all. It is offered by Impact Shares. Net Assets of \$6,586,158. Number of holdings 220. As of Nov 11th 2019.

Symbol: PXWEX Pax Ellevest Global Women's Leadership Index. Pax Ellevest Management LLC, investment adviser to the Pax Ellevest Global Women's Leadership Fund, is a subsidiary of Impax Asset Management and was founded in 2014 on the principle that gender diversity plays a critical role in business success over time, and that investors can benefit from investing in companies that advance women values. Their index has 400+ companies that are screened for representation of women on board, representation of women in executive management, female CEO, and female CFO. As of July 2019, it has more than \$350 million in assets under management.

Symbol: FWOMX Fidelity women leadership fund is late to the platform starting in May 2019. Consistent with other Fidelity funds there is no transaction fee, however the gross expense ratio is 1.12%. The portfolio already holds over \$19 million in assets in just a few months. Fidelity prioritizes companies that include a woman as a member of the senior management team, a company governed by a board for which women represent at least 1/3 of all directors, and in the advisers opinion, have adopted policies designed to attract, retain and promote women. The fund invests in US and international issuers.

Symbol: HERS.TO Solactive Equileap North American Gender Equality Index Trades on the Canadian exchange. This index provides exposure to companies domiciled in Canada or the United States that have demonstrated a commitment to gender diversity as part of their corporate responsibility strategy. The equal leap criteria include non-executive board gender balance, executive gender balance, senior management gender balance, workforce gender balance, promotion and career opportunities for each gender in total employees.

Symbol: GWILX Women in leadership US equity portfolio began December of 2015. It has a gross expense ratio of 1.11%. This fund criteria is inclusion of women in significant roles but not limited to chairwoman female board members, female chief executive officer, or women in management positions. AUM as of 9/30/2019 is \$20.6 million.

"Although many well-known impact funds now hold out to public their gender screening process," says Sutherland, "This list was chosen because Gender Equanimity is a primary stated goal AND firms may put pressure on corporate management using the power of their proxy votes held." An honorable mention to both Blackrock and Vanguard for integration into their offerings.



"I wouldn't expect most educated people to know that adding diversity to the leadership of a corporation can have noticeable changes to the outcome of all stakeholders," Sutherland concludes, " Thankfully, diversity performance is becoming a more talked about topic and one that can most definitely be applied to investment strategy."

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As a 20+ year financial veteran, Sutherland founded SI in 2014, to offer holistic planning services and investment model strategies that align with environmental social and governance values. Simple Impact LLC is located at 4500 Park Granada Calabasas, CA 91302. Phone (424)422-1001. 401K@simpleimpactllc.com Shãn Sutherland (CA Insurance Lic. #0D28620) is a Registered Representative and an Investment Adviser Representative with/and offers securities and advisory services through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered by Simple Impact or CES Insurance Agency.

Disclosure available at <https://www.simpleimpactllc.com/disclosures>

Shannon M Sutherland
Simple Impact LLC
+1 424-422-1001

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