

Frequently Asked Questions

What is Invested Interests?

Invested Interests is pretty simple. We want to get the best information on investing and social issues out to everyone. Anyone can use our information as a resource and we'd like nothing more than for you to find our site useful. Please tell other people about us; we strongly believe that the more people know about these issues, the better the world can be.

We are experienced investment advisors and web developers that believe social investing is an important movement. Our generation is looking for opportunities to create positive change through commerce. Everyday choices, when informed, can become powerful votes for social and economic improvement.

We are not trying to be a perfect organization, but we are trying to grow a business that has a social component. We're offering something different, something people need and we're having a good time doing it.

Are you Investment Advisors?

Yes, we are independent Registered Investment Advisors. We are fully licensed to offer financial advice. A few of us are also CPAs (Certified Public Accountants) and CFPs (Certified Financial Planners).

What financial services do you offer?

As Registered Investment Advisors we can offer many types of investments to our clients. We also work with large custodians like Ameritrade, Fidelity and Charles Schwab. If you work with us, you will hold your money at one of these large institutions and we will work with you to invest it appropriately.

Here is an [abbreviated list of the investments](#) we offer.

Why are you offering free financial information on your website?

We believe that some people simply want to invest on their own. We feel that this information should be available to the public, and we will do everything we can to develop the best tools and research available.

We also want to develop a great community around socially responsible investing. The more

people on our site talking about these issues, the better. Please visit our discussion section and contribute your thoughts.

Do you only offer social investments?

No. Many of our clients are not investing in social investments. We feel that social investing is an extra service that we offer, not the only service.

How long have you been doing this?

Many of us have extensive experience in financial services and social activism. On average, our advisors have 7-8 years of investment advisory experience.

Why should I work with you?

We are growing a business with a strong social component. Not only is our service a sustainable product, but structurally, we are committed to [returning 10% of our Net Profits to our communities](#).

It is our belief that when someone is given the choice to work with an organization like [Invested Interests](#), and they know they will receive all the [investment options](#) and services they need, they will be excited to work with us. We want people to do well for themselves by doing good.

How will we communicate?

We are located in San Francisco, CA. However, most of our clients are located outside of California. We are fully capable of conducting all of our services via the web, email, Microsoft NetMeeting, telephone and other. Poor communication has never been a problem with our clients.

What is social investing and does it make a difference?

We hope that our site can help you answer this question. Please look around at the tools, research and news we offer and [contact us](#) with questions.



For more information on personal finance and socially responsible investing, or to contact our investment advisors, visit us at www.investedinterests.com.

Becoming an investor is easy. Download the appropriate [application forms](#), complete and sign the applications, email/fax the forms to us and begin accessing your account.

Thank You,
Invested Interests