



**POLICY**

**RE: INVESTMENT**

**Adopted by Executive Council: February 12, 2024**

**Reviewed by Advisory Committee: September 21, 2022**

MoveUP believes in socially responsible investing. We define socially responsible investing as any investment strategy which seeks to consider both financial returns and social/environmental good to bring about social change.

We believe we can earn a good return on our investments while ensuring our investments satisfy ethical and moral standards. Such standards should consider diversity, equity, and inclusion (DEI), environmental impacts, green technologies and initiatives, a strong community and social partner. To accomplish this, we will use an investment firm that also believes in socially responsible investing and actively screens investment choices to ensure they comply with these ideals. As well, all investments must employ a robust environmental, social and governance (ESG) criteria.

MoveUP will not invest in the banking sector, as they frequently do not meet the criteria of progressive labour relations and/or a unionized workforce, and their investments are frequently at odds with our belief in socially responsible investing.

MoveUP will invest primarily in British Columbia and Canada but may seek to add foreign content to our portfolio if such an investment complies with our guidelines and adds value to our portfolio. Foreign content will be limited to a maximum of 20% of the value of the portfolio.