



AffinityCapital

MANAGEMENT INC.

YOUR MONEY, YOUR GOALS, YOUR VALUES

ABOUT US

Anup Ruparelia
Certified Financial Planner
Affinity Capital Management Inc.

I believe in cultivating long-term client relationships and emphasizing a genuine, honest and professional approach with my clients. My vast experience in financial consulting over the past 25 years has greatly developed my ability to articulate my clients' financial and lifestyle objectives.

Every individual has a unique relationship with their finances. Understanding a client's history, current lifestyle, belief-system, future goals and desires is crucial in preparing an effective financial plan.

YOU are the starting point, not your money.

The Future of Investing

As part of my unique offering, I encourage my clients to explore investment options that align their financial goals with their life-value beliefs. Specifically, I promote an approach to investing that integrates sustainable growth opportunities.

Today, responsible investing is about much more than just your personal values. The ESG (Environmental, Social, Governance) integration into the selection and management of investments is moving rapidly into the mainstream as a good investment practice. This approach has consistently provided superior risk-adjusted returns while encouraging a positive ESG impact.

I would be happy to meet with you to evaluate your personal situation and provide you with a comprehensive financial roadmap that will be aligned with your goals and values.

Let's talk and see if my approach is right for you.

The exploratory meeting is always free and there is absolutely no obligation.

You can reach me at 416-333-8625 or anup@affinitycapital.ca

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SOCIALLY RESPONSIBLE INVESTING

In recent years, a new area in the way investors evaluate investment options has emerged. It is known as Socially Responsible Investing (SRI). SRI involves the integration of Environmental, Social and corporate Governance (ESG) into the selection and management of investments.

Along with promoting ESG integration, evidence is showing that SRI is increasingly proving to reduce investment risk and leading to superior long-term financial returns.

SRI has come to encompass:

- Ethical Investing
- Socially Responsible Investing
- Sustainable Investing
- Vegan Investing
- Green Investing
- Community Investing
- Mission-Based Investing
- Impact Investing

Investors/Advisors/Portfolio Managers use one or more of the following strategies to incorporate ESG criteria into their investment decisions:

Positive Screening - Looking for investments with positive ESG performance relative to its peers.

Negative Screening – Excluding investments based on ethical, moral or religious beliefs.

ESG Integration – Combining ESG data with traditional financial analytics in choosing investments.

Shareholder Engagement – Influencing corporate management to bring forward ESG issues.

Sustainability Investing – Identifying investments that present solutions to current ESG Issues.

Impact Investing – Investing/financing businesses focusing on clear ESG purpose projects.

You can make money and have a positive impact on society and the environment.

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PRINCIPLE (OR VALUE) BASED INVESTING DOES MAKE A DIFFERENCE.

I have been a Financial Consultant to corporations throughout North America in various industries for the past 25 years. During that time, I observed many different corporate management styles and institutional behaviors; some good, some bad and others downright terrible.

Being an avid traveller, I began doing research into eco-tourism in pursuit of finding ways of seeing the world with insuring that these beautiful places will be around for my children and grand-children to enjoy. What I realized is that the concept of eco-tourism, alternative energy, responsible investing, sustainable food production, human rights, ethical behavior, eradicating world poverty, etc...are all interconnected and are part one universal theme:

You must be the change you wish to see in the world.
-Mahatma Gandhi

And doing even further digging into the Responsible Investing marketplace, it quickly became clear that profitability does not need to be sacrificed at the expense of poor corporate ESG (Environmental, Social, Corporate Governance). In fact, the opposite is true in many cases and especially for long-term growth.

The voluntary approach to corporate social responsibility has failed in many cases.
-David Suzuki

So, What does all this have to do with responsible investing? EVERYTHING!!!

Most corporations, even with good intentions, have not achieved their social responsibility goals voluntarily.

We have all heard of “money talks and b*llsh*t walks”. Well, I strongly believe in letting your money to do your talking. For most of us, our RRSP/TFSA/RESP /Non-Reg. investments are our largest assets besides our homes. And we greatly underestimate the collective power we have over corporations and governments around the world.

As a financial Advisor, I help my clients to realize the potential and positive impact investors can have on the world while achieving superior long-term financial returns.

Your money has a huge voice, why not leverage it for the greater good and your personal good.