

The GreenWise Portfolios

By design, the GreenWise portfolios bring together the top responsible investment mandates available to offer a modern, leading-edge product. This is an approach to sustainability that seeks to protect our future by reducing our impact on the planet.

No longer do investors have to choose between investing responsibly and achieving strong returns.

Take advantage of these portfolio solutions that address sustainability and materiality effectively to support investors' real values.

Be part of the solution!

CONSERVATIVE



40%
Equity

60%
Fixed Income

This asset mix is primarily focused on fixed-income securities. It also has a stock component to offer good growth in capital and increase the portfolio’s potential for long-term growth.

BALANCED



60%
Equity

40%
Fixed Income

This asset mix is weighted more toward long-term growth of capital. To reduce overall portfolio volatility it also has a significant component in fixed-income securities.

GROWTH



80%
Equity

20%
Fixed Income

This asset mix is for investors who are looking for a significant increase in capital over the long term. This portfolio has a bond component to balance out the short-term volatility of the equity component.

GreenWise Portfolio Conservative

	SERIES A	SERIES F
Codes	RGP600	RGP603
Management Fee(*)	1.70%	0.70%
Trailer Fee	1.00%	N/A

GreenWise Portfolio Balanced

Codes	RGP700	RGP703
Management Fee(*)	1.80%	0.80%
Trailer Fee	1.00%	N/A

GreenWise Portfolio Growth

Codes	RGP800	RGP803
Management Fee(*)	1.90%	0.90%
Trailer Fee	1.00%	N/A

(*) Trailer Fees are included in Management Fees.