

# INVESTMENT PORTFOLIOS THAT REFLECT YOUR VALUES

## OUR ORIGINS

Founded in 1995 by Brad Pappas, Rocky Mountain Humane Investing is the **first and only registered investment advisor focusing exclusively on the needs of the socially responsible and humane investor.**

We manage taxable and trust accounts for families and individuals as well as established IRA's, 401K rollovers and assets for non-profits.

### Rocky Mountain Humane Investing

- Manages client assets based in the U.S. and for foreign investors at Charles Schwab Institutional Services and Interactive Brokers
- Represents a viable alternative to mass marketed mutual funds where the client can have direct influence in how their portfolio is managed

## OUR STRENGTH

Rocky Mountain Humane Investing employs proprietary investment rank and trading systems for the goal of delivering returns above major market indices and index funds.

We believe in an All-Weather investment approach that aligns client portfolios with the state of the economy and monetary policy. The benefit to the investor is to preserve the value of their account when early warning signs of recessions are visible thus avoiding high-risk recession induced bear markets.

During periods of economic expansion our client portfolios are only invested in securities that pass our stringent socially responsible/ethical criteria and also rank in the top percentile of our ranking systems. Our rank systems have been back-tested for a minimum of 15 years and designed to deliver above average returns with market-level risk.



### *Socially Responsible Investing Trailblazer*

Created the "Cruelty Free Investing" concept while he was a broker with A.G. Edwards and Sons in 1990 and the first formal humane screen for Gretchen Wyler and the Ark Trust host of the Genesis Awards.





## PROVIDING CLIENTS WITH CRUELTY-FREE, SOCIALY RESPONSIBLE INVESTMENT MANAGEMENT FOR OVER 20 YEARS

### THE RMHI DIFFERENCE

- Contrary to mass marketed funds we are **highly responsive and accessible**. You have access to us via phone or email—we respond to every communication expeditiously
- We do not work on commission but on a flat-percentage of the assets, which gives us the **incentive to grow client accounts and preserve them in down years**
- We do not take custody of client assets; **we use Charles Schwab Institutional and Interactive Brokers as custodians** for client assets
- Registered since 1995, Rocky Mountain Humane Investing has a **clean regulatory history**
- We **help you every step of the way**—providing you with all necessary documents as well as assisting you with completing the Charles Schwab documentation



To see a live demonstration of the effectiveness of our proprietary systems, visit [greeninvestment.com](http://greeninvestment.com) and click on the Collective 2 link from the homepage.

Brad Pappas has proven that green portfolios can stay well in the black in a Collective 2 podcast. Visit our website and click on the Top Trader Radio link from the homepage.



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