



MFABC

Municipal Finance Authority of BC

Socially Responsible Investing

Survey Instructions

Each BC local government may submit only ONE (1) survey. To submit a response, you must provide your contact information and you must acknowledge that you are the person authorized to respond to the survey on behalf of your local government.

Local Government*

Victoria (City)



Your Name*

Position or Job Title*

Email Address*

Phone Number*

Acknowledgement*

☐

I am the person authorized to submit this survey on behalf of my local government.

Question 1*

Would your Municipality / Regional District be interested in investing in a socially responsible pooled investment fund if offered by the Municipal Finance Authority of BC? *(If "No" is selected, you may skip to Question 4.)*

☐

Yes

☐

No

Question 2

Would your organization accept the following requirements of participation in a socially responsible (SRI) fund:

- a) Funds must remain on deposit for a minimum period of 3 years to allow the fund to defray costs and ensure viability.
- b) Confirm your understanding that an SRI-type fund has reduced diversification and attracts higher fees relative to traditional pooled funds.
- c) Confirm commitment, prior to investing, either through a council resolution or an investment policy, that specifically allows for investment in an SRI-type fund.
- d) A representative from your organization must be willing to participate upon request in an "advisory group" to define the parameters of such a fund.

- ☐ Yes, agree to all.
- ☐ No.

Question 3

What is the dollar amount your organization would be willing to invest in an SRI fund?

Question 4

Do you have any additional comments you would like to share with the MFA about Socially Responsible Investing?

Submit

Save and resume later

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