



# Ethical Investment Procedures

(To be read in conjunction with the Uniting Church SA's Ethical Investment Policy)

## Overview

UC Invest has an obligation to ensure that our investment practices are consistent with the Uniting Church SA's Ethical Investment Policy ("the policy"). The policy directs our investment activities away from companies with certain defined characteristics.

In accordance with good governance, our investment activities remain open and transparent with investors and Uniting Church members invited to request information or lodge ethical investment concerns with us.

**For general enquiries about our ethical investment practices or information regarding our investment holdings, please contact us on 1300 274 151.**

## Lodging an ethical investment concern

If you have a specific concern about a particular company or investment held by UC Invest you may request a formal review of the holding (*Your concern must be based on ethical grounds*).

To request an ethical review of an investment, please list your concerns in writing to:

The Chairperson  
Uniting Church Investment Committee  
GPO Box 2145  
ADELAIDE SA 5001

## The review process

On receiving your request to review a company or investment on ethical grounds, the Uniting Church Investment Committee (UCIC) will undertake a review, addressing any specific ethical considerations.

Should any ethical issues arise, the matter will be referred to the Uniting Church SA Resources Board who will make a determination as to whether the company satisfies the Ethical Investment Policy of the Uniting Church SA.

In requesting a review you must provide details about specific ethical concerns and reasoning as to why you believe the investment breaches the Ethical Investment Policy.

Ethical reviews may be guided by reports and research from a range of providers who assess companies in terms of environmental, social and corporate governance criteria.

The findings of the review will be communicated to you in writing, normally within 30 days of receiving your original request.

## Lodging an appeal

If you are not satisfied with the outcome of the review, you may appeal the decision by having it referred to a determination of the Uniting Church SA - Standing Committee.

To lodge an appeal, please write to:

CEO / General Secretary  
Uniting Church SA  
GPO Box 2145  
ADELAIDE SA 5001

In lodging an appeal you will need to provide a rationale as to why you consider the Uniting Church SA Resources Board decision to be incorrect.