

# Socially and Environmentally Responsible Investing for Retirement

Both Fidelity Investments and TIAA-CREF provide numerous options for University retirement plan participants to invest in social choice low carbon funds and other socially conscious investment options.

## 1) Core Fund Options

Both investment providers recently added social choice low carbon funds to their core investment line-up. [Information](#) was sent to all University employees in early December 2015. Fidelity Investments added the following institutional class funds which are fossil fuel free: [Pax World Growth Fund](#) and [Pax World Global Environmental Markets Fund](#). In response to University of Utah faculty requests, TIAA-CREF created the [Social Choice Low Carbon Equity Fund](#).

- Information Flyer: [https://www.hr.utah.edu/forms/lib/Universal\\_Availability\\_Notice.pdf](https://www.hr.utah.edu/forms/lib/Universal_Availability_Notice.pdf)
- Pax World Growth Fund: <https://fundresearch.fidelity.com/mutual-funds/summary/704223502>
- Pax World Global Environmental Markets Fund: <https://fundresearch.fidelity.com/mutual-funds/summary/704223775>
- TIAA-CREF Social Choice Low Carbon Equity Fund: <https://www.tiaa-cref.org/public/tcfpi/Investment/Profile?symbol=90630893>

## 2) Brokerage Window

Each investment provider also has a brokerage option for University retirement plan participants to invest in thousands of other mutual funds, including numerous socially conscious fund options. *There may be additional fees for brokerage services.* Opening a brokerage account is simple and can be done by logging in to your account with the investment provider. Information and instructions for the brokerage windows of each provider can be found on the Benefits Department's website at [www.hr.utah.edu/benefits/retire\\_invest.php](http://www.hr.utah.edu/benefits/retire_invest.php).

Fidelity Investments and TIAA-CREF both offer confidential, individual counseling sessions and have customer service representatives available by phone to assist with investing. To obtain more information or to schedule a counseling session, go to the University's Fidelity Investments website at [www.netbenefits.com/uofu](http://www.netbenefits.com/uofu) or the TIAA-CREF website at [www.tiaacref.org/uofu](http://www.tiaacref.org/uofu).

*Prepared by the University of Utah Academic Senate Ad Hoc Re-Investment Dialogue Committee in consultation with Wendy Poppleton, CEBS, SPHR, SHRM-SCP, Director of Benefits, Division of Human Resource Management - Benefits Department, The University of Utah.*