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Contact: Michael Penn
Michael Penn Media Relations
212-580-7988
mpmedia@earthlink.net

“Profitable Socially Responsible Investing?”
Makes a Convincing and Provocative Case For Values-Based Investing,
Corporate and Social Change

*Pioneer of “Advocacy Investing” Demonstrates That
Socially Responsible Investors Can Also Make Money*

CHICAGO – Based upon his conviction that socially responsible investing (SRI) does not mean trading profits for personal or institutional values, author and investment advisor Marc J. Lane delivers a strong and passionate case for profitable SRI in “Profitable Socially Responsible Investing?,” his 32nd book. The book, released by Institutional Investor Books this month, offers a sensible and credible option to investors’ negative screening of “sinful” securities such as those for tobacco companies and defense contractors, which tend to sacrifice risk-adjusted returns.

“A careful examination of management’s behavior will empower the investor,” Lane writes, “more effectively than negative screening could ever have done, to deploy their investment capital in a way that gives voice to their principles. . . Since good management is a prime indicator of financial success, their inclination to invest in only ethical companies should serve them well. “ Lane goes on to argue that “only by investing in a company can one create the opportunity to influence the way it does business, especially in collaboration with other, like-minded investors.”

Relying upon “Advocacy InvestingSM,” his proprietary approach to values-based investing and his original research, Marc Lane proposes a proactive strategy that suggests when investors select virtuous companies, based upon their own values, their portfolios will thrive – and might even beat some of the popular indices. His eight-year study demonstrates that those companies that earned the highest marks for social justice and environmental concerns actually outperformed the Russell 3000.

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“Lane offers a clear and thoughtful approach to advance socially responsible investing,” says Victor De Luca, President, Jessie Smith Noyes Foundation. “He makes a convincing case that the strategic use of screens can result in both comparable rates of return and adherence to social and ethical principles.”

Throughout the book, Mr. Lane analyzes and responds to the empirical research of academics who have been most interested in SRI over the years. He also provides the practical tools to define an individual’s or institution’s core values in a way that is useful in constructing a portfolio and demonstrates how to draft a mission-based investment policy that satisfies fiduciary obligations. Addressing the power of investors to effect change in the boardroom and the executive suite, Lane dedicates a chapter to proxy voting and demonstrates how investors might most strategically vote their shares, ensuring that voice is given to values. Finally, the book provides a helpful, comprehensive glossary of investment terms.

Mindy S. Lubber, President, Ceres says “Marc Lane's book covers the breadth of socially responsible investing in a refreshing and accessible format for institutional investors and 'civilians' alike.”

“Doing well and doing good is possible,” says Stasia Zwisler, President and CEO, The Giving Trust, “and Marc Lane proves it . . . In the wake of ethics and governance scandals, this guide boldly takes socially-responsible investing to a new level.”

About the Author

Marc J. Lane is President of Marc J. Lane Investment Management, Inc. He is a practicing Chicago attorney and financial advisor; an Adjunct Professor of Law at Northwestern University School of Law; an Adjunct Professor of Business at the University of Illinois; and the author of 32 books.

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For additional information on purchasing the book and on Marc J. Lane, click on or go to the following URL: www.AdvocacyInvesting.com