



Active Guidance and Management

**We offer technology for guidance and management,
paired with a human touch for research and allocation decisions.**

The Align Investment Engine will suggest a strategy for your retirement, or other savings goals, and then manage your investments using state-of-the-art technology. Over time, our program will make adjustments to keep your strategy on track through rebalancing and risk reduction.

We don't just allow technology to control all the decisions. However, our investment research team conducts due diligence on every investment that makes its way into the portfolio. We help decide which investment vehicles make the most sense – stocks, ETFs, mutual funds, or others.

Mutual Funds and Exchange Traded Funds (ETFs)

When selecting a faith-based fund, we look beyond the fund's name or category. The popularity of socially responsible investing has led many mainstream brokerage houses to create their own "ethical investing" funds. Such funds often sound good but may not use faith-based screens. The same can be said for religious-based funds. We check the fund's screening policies and help select a collection of funds that align with biblical values, and then evaluate them for risk performance and appropriateness before investing.

Individual Stocks

We build a basket of handpicked stocks by screening companies to ensure they do not violate the moral and social hot buttons our clients wish to avoid. We also research to find companies that are making positive differences in our society and ones that meet our strict financial criteria.