

Expand the purpose of your practice

Improve your bottom line and transform your business with Corporate Social Responsibility

Corporate Social Responsibility (CSR) is a term that you may simply associate with “doing good” or “giving back”, but it can also have real tangible benefits to your practice. Your clients today are more engaged and increasingly placing more importance on an organization’s contribution to the world around them. In a recent survey, we found that 58% of investors have taken an action as a result of corporate governance concern. This mindset even carries over to their employee/employer relationship: 76% of all investors want to work for an employer that makes a positive impact on the world and for millennials that number rises.¹

What is Corporate Social Responsibility (CSR)?

A company’s efforts to evaluate the effect of its operations, processes and philanthropy on the broader community and to set policies and practices that maximize the positive impact of its activities on the company.

Applying a CSR framework to your practice

Incorporating a CSR program into your practice can take many shapes. By leveraging the framework below, you can build your program around what best suits your needs and what you’re passionate about.



Governance

Ethical oversight to enhance and project value



Community

Engagement and volunteer efforts to make a difference in peoples lives



Diversity, Equity & Inclusion

Diverse and inclusive teams drives innovation and acceptance



Sustainability

Efforts to positively impact our environment

CSR Projects

These can be easy to execute with little resources or revenue impact. CSR projects are typically specific one-off obligations to support local community initiatives. Examples include sponsoring a nonprofit fundraising event (i.e. walk, gala) or issuing a community grant towards a local nonprofit's financial education program.

CSR Culture

Requiring a more moderate investment of time and resources, building a CSR culture can help engage your employees through an ongoing organization commitment to a specific philanthropic cause. This can include corporate volunteer days or a company match for employee donations.

CSR Business Integration

Requiring a larger investment of time and resources and has the potential to add to your company's value proposition, providing an opportunity for direct or indirect financial return. Examples include the development of a foundation and/or the launch of a targeted CSR program tied to your business' objectives. These approaches make a distinct positive impact on society and can tie directly to your practice's business strategy.

You may already be doing some of these activities without formally thinking of them as part of your practice's CSR program. Make the most of your CSR activities by incorporating them into your mission statement, RFP responses and marketing materials. This can be a way to differentiate your practice while allowing you to

1 *Attract and retain clients*

2 *Improve employee engagement: tool for recruitment and retention*

3 *Build/reinforce a strong brand image*

4 *Positively impact your local communities*

[Visit nuveen.com/retirement](https://www.nuveen.com/retirement) to learn more.

¹ Nuveen Seventh Annual Responsible Investing Survey, 2022.

This material is not intended to be a recommendation or investment advice, does not constitute a solicitation to buy, sell or hold a security or an investment strategy, and is not provided in a fiduciary capacity. The information provided does not take into account the specific objectives or circumstances of any particular investor, or suggest any specific course of action. Financial professionals should independently evaluate the risks associated with products or services and exercise independent judgment with respect to their clients.

Nuveen provides investment advisory solutions through its investment specialists. Nuveen, LLC.

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR DISTRIBUTION TO THE PUBLIC.