

The Flexible Advisor Podcast Summary

[Episode #]. ESG Investing: “This is where people are” - With Jon Hale

Summary:

More often than not, clients want their investments to reflect their personal goals and moral values.

In this episode, Laura Gregg and David Partain speak with Jon Hale, Ph.D., CFA, the Director of Sustainability Research for the Americas at Morningstar.

Jon is a widely recognized leader in the ESG and sustainable investing field, and is here to discuss misinterpretations around this type of investing and its power in the marketplace. He additionally shares a framework for sustainable investing and explores the future of ESG investing.

Jon discusses:

- His opinion on ESG articles
- The importance of a strong client-advisor relationship to ensure investments reflect clients’ morals and investing goals.
- His sustainable investing framework and how he built out Morningstar’s ESG investing
- Who and what will be driving ESG investing in the future
- And more

Resources:

- [FlexShares Exchange Traded Funds](#)
- Morning star report
- [The Morningstar Sustainable Investing Framework](#)

Connect With Jon Hale:

- [LinkedIn: Jon Hale](#)
- [Jon Hale - Medium.com](#)

Connect With Laura Gregg:

- [Email](#)
- [Laura Gregg's LinkedIn](#)

Connect With David Partain:

- [Email](#)
- [David Partain's LinkedIn](#)

About Our Guest:

Jon Hale, Ph.D., CFA, is head of sustainable investing research for Morningstar. He directs the company's research initiatives on sustainable investing, beginning with the launch of the Morningstar Sustainability Rating™ for funds in 2016. Jon holds a bachelor's degree, with honors, from the University of Oklahoma and a doctorate in political science from Indiana University. Has been one of the Barron's 20 most influential people in ESG investing. He's also been named as the top 10 leaders of ESG and Impact Investing by Investment News.

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