

# News Release



Colorado Public Employees' Retirement Association  
1300 Logan Street, Denver, CO 80203-2386  
303-832-9550 • 303-863-3819 Fax • 1-800-759-7372  
[www.copera.org](http://www.copera.org)

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For more information contact:  
Katie Kaufmanis  
Director of Communications  
303-863-3814  
[kkaufmanis@copera.org](mailto:kkaufmanis@copera.org)

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## **Colorado PERA Adds Socially Responsible Investment Option to its 401(k) and DC Plans**

DENVER—The Colorado PERA Board of Trustees has approved the addition of a Socially Responsible Investment (SRI) option to the PERA 401(k) Plan and PERA DC Plan. Beginning in January 2008, participants will be able to invest in the Pax World Balanced Institutional Fund (Ticker symbol: PAXIX).

PERA selected the Pax World Balanced Institutional Fund to make available to participants an investment alternative which avoids investment not only in companies active in Sudan but in a more comprehensive array of social issues as well. The fund does not invest in companies significantly involved in the manufacture of weapons or weapons-related products, the manufacture of tobacco products, companies that are involved in gambling as a main line of business, or those that engage in unethical business practices.

PERA's action was, in part, responsive to the legislation policy established in House Bill, 07-1184 and in part due to plan participant requests.

Since the PAX World Balanced Institutional Fund is a balanced fund, participants may elect this option as their only investment fund and be diversified in their 401(k) and DC Plan portfolio.

"We are proud to offer this choice for our members who are interested in directing their investment dollars to impact social issues when saving for retirement," said Meredith Williams, PERA's executive director.

PERA's 401(k) Plan has 72,565 participants and \$1.7 billion in assets. PERA's DC Plan has 449 participants and \$1.9 million in assets. The 401(k) Plan is available to all PERA members while the DC Plan is available to certain employees of the State of Colorado who were hired after January 1, 2006.

Colorado PERA provides retirement and other benefits to 410,000 current and former employees of over 400 government and public entities in the state of Colorado. Colorado PERA is the 25th largest public pension plan in the U.S. with assets of \$42 billion.

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