



# Make Your Money Count™

## Screening Tools Overview



Screening Tool	Individual Stocks	Stock Mutual Funds	Stock ETFs	Bonds, Bond Mutual funds / ETFs	Private Companies	Annuity Subaccounts	UITs
BRI Institute	x				x		
eVALUEator	x	x	x	x	x	x	
Inspire Insight	x	x	x				x

Screening tools can be helpful for gathering behind-the-scenes understanding, but if a result surprises you, contact the fund to learn the story behind the screening results. Also, screening tool reports are not compliance approved for sharing with clients.