Since my early teens I have searched to find the truth about success, and I have been advising people on their finances and managing global investment portfolios for over 25 years. I welcome your questions and hope my answers can help you feel happier, more successful, and more at ease about your finances.

My partner heads up a research hospital, and I’m a neurosurgeon. We both came from well-to-do families and graduated from Ivy League schools. We realize that we’ve received huge advantages over our lifetimes, simply due to our privileged backgrounds. Furthermore, my father just died, and we stand to inherit a not-so-small fortune. With all this Occupy Wall Street/99 percent stuff going on, my partner is feeling incredibly guilty. I realize that we are the 1 percent, but I tell her that we didn’t invent this economic system that benefits us so well. It’s not our fault that our jobs pay so well. Anyway, income disparity is a problem, and our capitalist society does seem to be unraveling a bit. Are we to blame? Could we have done more to bring about a fairer society?

This is a wonderfully refreshing question, and I will give you my thoughts on it. But first, I want to give a mini-lecture: You are doing great work! You are healing people. Your partner’s work in a research hospital is helping to end suffering. For those you help, your presence is a blessing. It is wonderful that you are using your talent and skills, which have been honed by experience and years of education, to help our world. You could have used your talents to help sell cigarettes, produce violent movies, or create “smart bombs.” Thankfully, your calling was to help end suffering. The Buddha spoke about the eight noble truths throughout his career. Right livelihood was one of the truths. I would examine your life from the standpoint of the eight truths. If you want a Christian metaphor to contemplate, I would suggest Luke 12:48 — “to whom much is given much is expected.” For another perspective, the Quran says, “Believers, Jews, Sabaeans, or Christians — whoever believes in God … and does what is right — shall have nothing to fear or regret.”

Again, you asked a great question, and I would like to address it now, but in a traditional Taoist approach, I will answer it with questions. What could you do today to bring about a fairer society? If Moses or Buddha were to follow you around and see what you own and how you spend your time and money, would you regret that you had not prepared for his visit? Think on this question with the knowledge that over 30,000 people die each day of preventable disease, and there are around 168 million orphaned or abandoned children in the world. You also ask, “Are we to blame?” I don’t believe in the blame game. I do believe in the right behavior game, so ask yourself what you can do to help bring about the fairer society you wish for, and then act.

In the Wall Street Journal recently, Al Gore pitched the business community to begin adopting a number of “sustainable capitalism” practices in their companies to encourage stability in financial markets, benefit the environment, and reward long-term investors and loyalty. Some of the recommendations included ending the practice of issuing quarterly earnings guidance, increasing the volume and frequency of information made available by companies, and aligning compensation packages for executives with long-term sustainable performance. I couldn’t agree more. But aside from investing in responsible companies, how can I be more of a rabble-rouser and pressure other companies to do the right thing?
My favorite saying is from St. Francis, who said, “Sometimes when I ’preach,’ I use words.” I really think to be effective as a rabble-rouser, we must be an example; as Gandhi said, “Be the change!”

Are you doing the right thing? If you are asking a company, for example, to be more “responsible” and improve their environmental footprint, are you? Do you recycle, buy local goods, buy US-made products (including cars), and eat a local and organic plant-based diet? Do you pay your bills on time and keep your commitments in an ethical and responsible way? I am a professional investment manager, so I get to meet with the management of companies, face-to-face, and I can tell you that many want to be held to a standard that promotes sustainability and embraces virtue and good citizenship. So letters, emails, phone calls, and such are great. Also, don’t forget the fact that corporations are made up of people. Every employee should take responsibility for his or her company’s behavior. The guy who drives the van to deliver cigarettes to the corner store is no less connected to the ill effects of his products than the president of the company. So start with trying to inspire your own company to adopt some of the behaviors of companies like Whole Foods or Australian Ethical Investment. Visit their websites or the Caux Round Table site for good, thoughtful fodder (cauxroundtable.org). We all want the same things — love, happiness, security, not to suffer — so start the conversation about change on what you have in common. Good luck! And keep me posted on your progress.

Paul Sutherland is president of Financial & Investment Management Group. See excerpts from his best-selling book Zenvesting, as well as his latest book, The Virtue of Wealth, at spiritualityhealthbooks.com. To ask a question or chat, contact him at paul@spiritualityhealth.com.

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