

## VISION

We believe the integration of environmental, social and governance risks and opportunities into fundamental company analysis enhances our ability to identify and invest in the most durable franchises. Further, active engagement with management on such issues should aid long-term value creation for investors and other stakeholders alike.

## MISSION

We seek to identify and invest in companies with:

- differentiated products and services
- a genuine commitment to stakeholders, including employees, customers, communities, and shareholders
- a responsible approach to environmental stewardship and natural resource management
- sound corporate governance practices
- long-term vision / perspective

We seek to encourage companies to enhance their commitment to all stakeholders.

## WE BELIEVE

1. A company's products and services should enrich its customers' lives and/or business goals.
2. Management should monitor and report the effects of operations on the environment and seek ways to reduce the consumption of shared natural resources.
3. Companies should fairly compensate and develop talent across all levels, assuring reasonable wages and opportunities for advancement for all.
4. Management should actively seek out and give full attention to diverse backgrounds and perspectives in all aspects of the business.
5. Companies should establish sound corporate governance to ensure that all equity holders are treated fairly, rewarded for the success of the organization, and given a voice to advocate for change.
6. Management should actively monitor the impact of its operations, as well as those of its suppliers and customers, to ensure that its actions, or those of its suppliers and customers, do not compromise the basic human rights of any peoples throughout the world.
7. Companies should be actively involved in the communities where they operate and provide support for the betterment of the entire community.
8. Management should clearly articulate a long-term vision of how the organization will create value for all constituents, and actions should be aligned with these objectives rather than shorter-term interests of specific constituents.

Investing involves risk, and you may incur a profit or a loss. Investment returns and principal value will fluctuate so that an investor's portfolio, when redeemed, may be worth more or less than their original cost.

ESG/Sustainable investing may incorporate criteria beyond traditional financial information into the investment selection process. This could result in investment performance deviating from other investment strategies or broad market benchmarks. Please review any offering or other informational material available for any investment or investment strategy that incorporates sustainable investing criteria and consult your financial professional prior to investing.