



Strategy Profile: A Multi-Dimensional Approach To Faith-Based Investing

1919 HAS A RICH HERITAGE
OF INVESTING ACCORDING
TO THE GUIDELINES OF THE
UNITED STATES CONFERENCE
OF CATHOLIC BISHOPS.

40 YEARS STRONG IN SRI

1919 Investment Counsel, LLC is an experienced socially responsible manager with a history that can be traced back to 1975. Our history of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

As of September 30, 2020, 1919 Investment Counsel managed approximately \$16 billion in assets, of which approximately \$1.6 billion is for socially responsible investors.

WITH OFFICES IN

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New York • Philadelphia
San Francisco • Vero Beach

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The 1919 SRI/ESG Catholic Values Equity Strategy seeks long-term capital appreciation by investing in companies that offer both an attractive investment opportunity and that exhibit business practices that are consistent with the guidelines published by the United States Conference of Catholic Bishops (USCCB).

SRI CAPABILITIES AND EXPERTISE

At 1919 Investment Counsel our multi-dimensional approach to socially responsible investing has been refined over the past 40 years. Our research-driven, fundamentally-based investment approach is conducted by a team of 12 investment professionals which includes 3 social impact analysts who utilize a rigorous research process from an SRI, Environmental, Social and Corporate Governance (ESG) and Catholic values perspective.

ABOUT OUR SRI/ESG PROCESS

Our comprehensive process includes:

- **Negative Screening:** Eliminating companies whose products and/or activities do not meet the guidelines established by the United States Conference of Catholic Bishops.
- **Positive Impact Research:** Employing our proprietary positive-impact analysis to identify companies that are contributing positively in terms of our socially responsible guidelines and mandate.
- **Corporate Engagement:** Proactively communicating with the management of our portfolio companies to encourage positive social change.



Companies in our portfolio are then monitored to ensure they meet both our socially responsible and fundamental criteria on an ongoing basis. ■

Disclosure

All investments involve risk, including risk of loss and there is no guarantee investment objectives will be met.