

1919 SRI/ESG Equity Strategy



Strategy Profile: A Multi-Dimensional Approach To Socially Responsible Investing

OUR 5 SOCIAL GUIDELINES

- ▶ **Employment Practices:** Fair and reasonable employment practices.
- ▶ **Human Rights:** Contribute to the general well-being of host communities and respect human rights.
- ▶ **Environment:** Minimize the negative impact of business activities on the environment.
- ▶ **Weapons:** Do not manufacture nuclear weapons, other weapons of mass destruction or derive more than 5% of their revenue from production of non-nuclear weaponry.
- ▶ **Tobacco:** Do not derive more than 5% of their revenue from the production or sale of tobacco products.

The 1919 SRI/ESG Equity Strategy seeks long-term capital appreciation by investing in companies that meet our stringent socially responsible guidelines regarding employment practices, human rights, the environment, weapons and tobacco. It is our belief that addressing social issues in a positive manner can translate into sound business and attractive long-term investment potential for our clients.

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 15 investment professionals which includes 3 social impact analysts who utilize a rigorous screening process from both an SRI values-based and Environmental, Social and Corporate Governance (ESG) perspective.

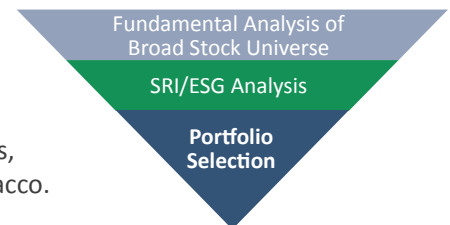
ABOUT OUR SRI/ESG PROCESS

We evaluate each company through both SRI and ESG lenses to provide a more comprehensive perspective on the opportunities available.

Our comprehensive SRI/ESG process includes:

- **Negative Screening:** Eliminating companies whose products and/or activities do not meet our SRI/ESG guidelines regarding employment practices, human rights, the environment, weapons and tobacco.
- **Positive Impact Research:** Employing our proprietary positive-impact analysis to identify companies that are contributing in terms of our socially responsible investing screens and mandate.
- **Corporate Engagement:** Proactively communicating with the management of our portfolio companies to encourage positive social change.

Our Multi-Dimensional Investment Approach



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

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 rich heritage of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

WITH OFFICES IN

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Disclosure

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