

# 1919 SRI/ESG Climate Aware Equity Strategy



## Strategy Profile: A Multi-Dimensional Approach To Climate Aware Investing

### OUR 6 SOCIAL GUIDELINES

- ▶ **Climate and Carbon:** Minimize carbon intensity in companies' operations and throughout their supply chains.
- ▶ **Environment:** Minimize the negative impact of business activities on the environment.
- ▶ **Employment Practices:** Have fair and reasonable employment practices.
- ▶ **Human Rights:** Contribute to the general well-being of host communities and respect human rights.
- ▶ **Weapons:** Do not manufacture nuclear weapons, other weapons of mass destruction, or derive more than 5% of revenue from non-nuclear weapon production.
- ▶ **Tobacco:** Do not derive meaningful revenue from tobacco products.

The 1919 SRI/ESG Climate Aware Equity Strategy seeks long-term capital appreciation by investing in companies that offer both an attractive investment opportunity and an awareness of their impact on society. The strategy seeks to invest in companies addressing the challenges associated with climate change.

### SRI CAPABILITIES AND EXPERTISE

At 1919 Investment Counsel, LLC our multi-dimensional approach to socially responsible investing has been refined over the past 50 years. Our research-driven, fundamentally-based investment approach is conducted by a team of 11 investment professionals which includes 3 responsible investing analysts who utilize a rigorous research process from both an SRI values-based and Environmental, Social and Corporate Governance (ESG) perspective.

### ABOUT OUR SRI/ESG PROCESS

When considered for inclusion in the strategy, a company's carbon footprint is evaluated on both an absolute and relative basis to their peer group and industry. 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:

- **Values-Based Assessment:** Eliminating companies whose products and/or activities do not meet our SRI/ESG Climate Aware guidelines regarding the environment, carbon intensity, employment practices, human rights, weapons and tobacco.
- **Impact through Investments:** Employing our proprietary positive impact analysis to identify companies that are contributing to a lower carbon emissions future.
- **Impact through Engagement:** Proactively communicating with the management of our portfolio companies to engage positive change.



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

### MORE THAN 50 YEARS STRONG IN SRI

1919 Investment Counsel, LLC is an experienced socially responsible manager with a history that can be traced back to 1971. Our rich heritage of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

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## Disclosure

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

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