

1919 SRI/ESG Equity Strategy



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

OUR 5 SOCIAL GUIDELINES

- ▶ **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.

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.

WITH OFFICES IN

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The 1919 SRI/ESG Equity Strategy seeks long-term capital appreciation by investing in companies that offer both an attractive investment opportunity and that meet our stringent socially responsible guidelines regarding environment, employment practices, human rights, weapons, and tobacco.

SRI CAPABILITIES AND EXPERTISE

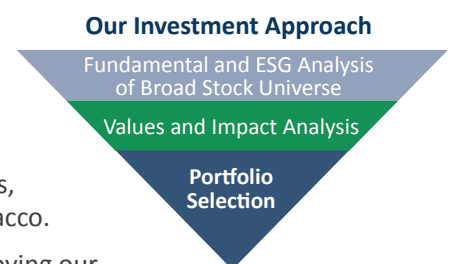
At 1919 Investment Counsel, LLC our multi-dimensional approach to socially responsible investing has been refined over the past 50 years. Our research-driven, fundamentally-based investment approach is conducted by a team of 11 investment professionals which includes 3 responsible investing impact analysts 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

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 guidelines regarding employment practices, human rights, the environment, weapons and tobacco.
- **Impact through Investments:** Employing our proprietary positive-impact analysis to identify companies that are contributing in terms of our socially responsible investing screens and mandate.
- **Impact through 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. ■

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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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