Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
Loring Ward Global Portfolio Series SRI Balanced

About This Strategy
Assets Under Management (AUM): $5.62M (in US$ millions)
Required Minimum: --
Benchmark used: Blend: S&P500, MSCI EAFE, BofA ML US Trsy/Agcs AAA 1-3Yr
Strategy type: Balanced Strategies
Strategy description: Loring Ward’s Socially Responsible Investing (SRI) Global Portfolio Series is designed to meet the needs of investors looking for investments that serve their social and ethical values and beliefs. The SRI portfolios invest in the DFA US Social Core Equity 2 fund, DFA International Social Core Equity fund, and the DFA Emerging Markets Social Core Equity fund. The social screens are validated through the use of MSGI ESG Research, formerly KLD Research and Analytics.

The DFA Funds are sponsored by Dimensional Fund Advisors and distributed by DFA Securities LLC. Consider the investment objectives, risks, charges and expenses of the DFA Funds carefully before investing. The prospectus and if available, summary prospectus, contain this and other information about the DFA Funds. To obtain a prospectus, summary prospectus, additional information about the DFA Funds, or performance data current to the most recent month-end, please call Dimensional Fund Advisors collect at 512-306-7400. Please read the prospectus and summary prospectus carefully before investing.

About The Company
Institution Name: LWI Financial Inc. (“Loring Ward”)
Approach to Sustainable & Responsible Investment: LWI Financial Inc. (“Loring Ward”) is an investment adviser registered with the Securities and Exchange Commission. Securities transactions are offered through its affiliate, Loring Ward Securities Inc., member FINRA/SIPC. IRN B 13-064 (Exp 6/15)
Total AUM in SRI: $5.2M (in US$ millions)
Research conducted: Externally
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Specific Screening Information by Category

| Environment | Social | Governance | Products | Other 

- **Human Rights**: Restricted/Exclusionary Investment - Exclude companies that do not have dedicated diversity and inclusion programs
- **Labor Relations**: Restricted/Exclusionary Investment - Exclude companies that have had major recent controversies relating to child labor infractions in the U.S. or abroad
- **Conflict Risk**: Restricted/Exclusionary Investment - Exclude companies that are engaged in certain for profit business activities in or with the Republic of the Sudan

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