Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
1919 Investment Counsel SRI Growth Equity Institutional

About This Strategy

Assets Under Management (AUM): $45M (in US$ millions)

Required Minimum: 1 million

Benchmark used: Russell 1000 Growth

Strategy type: Equity Large Cap

Strategy description: The SRI Growth Equity Institutional strategy adheres to a disciplined investment process to identify high quality, well-established companies with superior financial characteristics. Our objective is to outperform the Russell 1000 Growth index over a full market cycle, while incurring similar or lower risk. Our research team looks to uncover companies positioned to outperform based upon strong and growing fundamental characteristics including above average earnings growth potential, growth in sales revenues, solid cash flows and expanding profitability margins. Socially responsive investing strategies seek competitive risk-adjusted returns, while reflecting the unique social goals of each client. Our dedicated team of social research analysts conducts proprietary social research on domestic and international companies and issues. The researchers utilize customized screens to help 1919 Investment Counsel's portfolio managers eliminate companies that do not meet the client's specific social requirements and select investments that do.

Strategy web link: --

About The Company

Institution Name:
1919 Investment Counsel

Approach to Sustainable & Responsible Investment: 1919 Investment Counsel works with socially aware investors including individuals, businesses, schools, foundations, religious institutions, and other nonprofit organizations. With more than 35 years of experience, the firm partners with clients to create customized investment solutions. The firm's equity and fixed income strategies help clients achieve sustainable financial success in harmony with their values.

Total AUM in SRI: $1180.0M (in US$ millions)

Research conducted: Both internally and externally

Researcher name: Internal social research team

Contact info:
600 Vine St., Ste. 2000
Cincinnati, OH 45202
United States
Phone: (800)654-5777
Fax: (513)621-7665
Email: sri@1919ic.com
Web: http://www.1919ic.com
Specific Screening Information by Category

Environment

- **Climate / Clean Technology**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Pollution / Toxics**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.
- **Other Environmental**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.

Social

- **Community Development**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Diversity & Equal Employment Opportunity**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Human Rights**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Labor Relations**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Conflict Risk**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.

Governance

- **Board Issues**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.
- **Executive Pay**: Combination of Positive and Restricted/Exclusionary Strategies - The selection and application of this criteria is based on a client's ethical investing goals.

Products

- **Alcohol**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.
- **Animal Welfare**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.
- **Defense/Weapons**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.
- **Gambling**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.
- **Tobacco**: Restricted/Exclusionary Investment - The selection and application of this criteria is based on a client's ethical investing goals.

Other

- **Other/Qualitative**: Other client-specific criteria available upon consultation.
- **Shareholder Engagement - Private Dialogue**: Conducted with companies on environmental, social or governance issues
- **Proxy Voting**: Actively voted by my institution for this investment strategy in support of environmental, social or governance issues in accordance with formal guidelines

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1660 L Street NW, Suite 306
Washington, DC 20036
Phone (202) 872 5361 Fax (202) 775 8686