Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
1919 Investment Counsel SRI International ADR Equity Institutional

About This Strategy

Assets Under Management (AUM): $67.5M (in US$ millions)

Required Minimum: 1 million

Benchmark used: MSCI EAFE

Strategy type: International/Global

Strategy description: The SRI International ADR Equity Institutional strategy strives to outperform the total return of the MSCI EAFE index over a full market cycle of 3 to 5 years. The International ADR stock selection process entails both quantitative and fundamental analysis and is provided by Clearbridge Investments, LLC, an unaffiliated investment manager. The stock selection process identifies foreign stocks that are trading below normal valuation levels, while the fundamental research highlights those companies that have catalysts in place to spur a return to normal valuation. Our dedicated team of social research analysts conducts proprietary social research on international companies and issues, while reflecting the unique social goals of each client. Each security considered for purchase is evaluated using a comprehensive social analysis method, including 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

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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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