

We Can Do Well by Doing Good

For years, we have been intrigued, but disappointed, in socially conscious investing. The problem stems from the methodology, which begins with conventional investment management and then overlays several negative screens on the portfolio to eliminate companies that “do bad things.” We decided to approach investing from an affirmative approach.

We seek to invest and partner with companies that we can be proud of. To do so, we focus on a positive corporate culture; companies that make the lives of their employees, their clients, and their communities better.

Companies with positive culture tend to perform well

In 1937, Norman Mesirow founded his business on three core principles:

1. Be good to your **employees**
2. Treat your **customers** how you want to be treated
3. Give back to your **community**

By investing in companies whose **culture** meets all three of these principles we seek to earn a return that reflects a long-term competitive advantage while making the world a better place.



	Impact (Gross)	Impact (Net)	S&P 500 Index
1 year	11.39%	10.34%	7.33%
3 year	10.20%	9.17%	11.26%
Since inception	11.01%	10.03%	10.64%

Inception date: 1/1/2016

	Impact (Gross)	Impact (Net)	S&P 500 Index
2016	11.73%	10.76%	9.54%
2017	15.67%	14.54%	19.42%
2018	-3.62%	-4.38%	-6.24%
2019	12.56%	12.28%	13.07%

¹ Net performance figures derived from Black Diamond Performance Reporting, LLC – Composite Engine Tool. The impact strategy does not reinvest dividends or other income. Past performance is not indicative of future results. Gross of fee performance does not reflect the payment of advisory fees and other expenses. Net returns include the actual composite advisory fees, up to the maximum 1.5% advisory fee. The Benchmark is the S&P 500 Price Index. Standard & Poor's 500, often abbreviated as the S&P 500, or just the S&P, is an American stock market index based on the market capitalizations of 500 large companies having common stock listed on the NYSE or NASDAQ. The S&P Price Index excludes dividends from the return calculation. The index is unmanaged and does not incur management fees, transaction costs or other expenses associated with investible products. It is not possible to invest directly in an index.

Our results are also measured in impact*

The companies we follow have proven track records in making a positive impact in their community. Examples include:

- Donation of > \$150 million to support STEM education²
- Greater than 490,000 hours of volunteer community work³
- Development of an entrepreneurship program for girls, engaging and inspiring over 10,000 girls across 100+ countries; 26% of alumni go on to major in computer science⁴
- Donation of >\$850,000 to fight cancer, including research grants, donations, and fundraising⁵
- Donation of 1% on all gift card sales to local communities, and provision for tens of thousands of new shoes to children in need⁶
- Development of a high-tech camp for children, designed to dispel stereotypes of the high-tech industry⁷
- Grants to businesses that are helping people and communities with limited resources gain access to the internet⁸
- \$5 million cash pledge to support families vulnerable to homelessness⁹

We invite you to join us

- Invest with your values
- Associate with companies you can be proud of
- Earn a return while sticking to your principles

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*Information has been included to illustrate positive impact. The inclusion is not designed to convey an offer to sell nor a solicitation to buy a specific security.

2 <https://www.pnewswire.com/news-releases/texas-instruments-commits-5-million-to-advance-stem-education-in-plano-isd-133047958.html>

3 <http://www.ti.com/pdfs/shared/citizenship/volunteerism.pdf>

4 <http://www.salesforce.org/technovation-taught-us/> and <http://www.salesforce.org/grants/>

5 <http://images.nvidia.com/content/crr/2017/sustainability/pdf/2017-NVIDIA-Sustainability-Report-Final.pdf#page=25>

6 <https://shop.nordstrom.com/c/nordstrom-cares-non-profit-support>

7 <https://www.microsoft.com/en-us/diversity/programs/digigirlz/hightechcamp.aspx>

8 <https://www.microsoft.com/en-us/affordable-access-initiative/grant-fund>

9 <https://www.zillowgroup.com/the-home-project/>

10 <https://www.thewaltdisneycompany.com/wp-content/uploads/2017disneycrupdate.pdf>

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