

# 1919 SRI Fossil Free Equity Strategy



## Strategy Profile: A Multi-Dimensional Approach To Fossil Free Investing

### OUR 6 SOCIAL GUIDELINES

- ▶ **Fossil Free:** Do not invest in companies that have significant direct exposure to fossil fuel real assets.
- ▶ **Environment:** Minimize the negative impact of business activities on the environment.
- ▶ **Employment Practices:** 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 their revenue from production of non-nuclear weaponry.
- ▶ **Tobacco:** Do not derive more than 5% of their revenue from the production or sale of tobacco products.

The **1919 SRI Fossil Free Equity Strategy** seeks long-term capital appreciation by investing in fossil free-oriented companies with a smaller carbon footprint, including those companies whose projects, products, and/or processes support a transition to a lower-carbon economy.

### SRI CAPABILITIES AND EXPERTISE

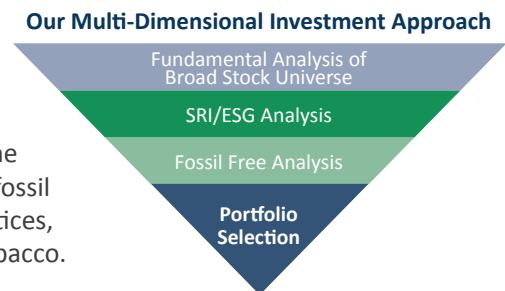
At 1919 Investment Counsel our multi-dimensional approach to socially responsible investing has been refined over the past 40 years. Our research-driven, fundamentally-based investment approach is conducted by a team of 15 investment professionals which includes 3 social impact analysts who utilize a rigorous research process from both an SRI values-based and Environmental, Social and Corporate Governance (ESG) perspective.

### ABOUT OUR SRI/ESG PROCESS

When considered for inclusion in the strategy, a company's carbon footprint is evaluated on both an absolute and relative basis to their peer group and industry. 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:

- **Negative Screening:** Eliminating companies whose products and/or activities do not meet our SRI/ESG guidelines regarding the environment and in particular fossil free criteria, employment practices, human rights, weapons and tobacco.
- **Positive Impact Research:** Employing our proprietary positive-impact analysis to identify companies that are contributing to a fossil free mandate.
- **Corporate 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. ■

### Disclosure

All investments involve risk, including risk of loss and there is no guarantee investment objectives will be met.

### 40 YEARS STRONG IN SRI

1919 Investment Counsel, LLC is an experienced socially responsible manager with a history that can be traced back to 1975. Our rich heritage of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

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