

## Our Holistic Approach to Investing With Impact

**The Three I's of Impact: Intentionality, Influence and Inclusion;** customizable to a client's unique goals, represent the range of approaches that investors can pursue across asset classes to maximize positive impact.

### Investing with Impact Platform Strategies:

- 100%** TAKE AN INTENTIONAL APPROACH TO IMPACT
- 70%+** ENGAGE IN ACTIVE OWNERSHIP
- 20%+** ARE FROM DIVERSE OWNED FIRMS<sup>(1)</sup>

### INTENTIONALITY

Intentional investment process that seeks to generate market-rate returns alongside positive social and environmental impact in one or more of the following ways:

Minimize  
Objectionable Impact

Generate  
Targeted Impact

#### Restriction Screening:

Reduce exposure to companies that detract from intended positive impacts

**ESG Integration:**  
Consider environmental, social and governance across corporate practices in the investment process

#### Thematic Solutions:

Focus on companies whose products & services contribute to sustainability solutions

### INFLUENCE

**Active Ownership:** Management engagement, strategy setting, proxy voting, resolution filing, filling board seats and more to modify behavior of portfolio companies to generate better social and environmental outcomes and/or

**Market Building:** Seek to influence the industry through collaborative affiliations, and adopting global frameworks

### INCLUSION<sup>1</sup>

Diverse Firm Ownership and/or

Diverse Representation Across Investment Professionals

<sup>1</sup> Inclusion defined as diverse asset manager ownership and/or diverse portfolio manager representation. Morgan Stanley's Global Investment Management Analysis (GIMA) team, defines diverse asset managers as those with 50% or greater ownership by women or racial/ethnic diverse individuals. This definition aligns with the US Equal Employment Opportunity Commission categories and includes: Hispanic or Latino, Black or African American, Asian, American Indian or Alaska Native, Or Native Hawaiian or other Pacific Islander. Diverse representation is defined as 50% or greater female named portfolio managers, as reported by the asset manager.

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