### Global Sustain Group Sustainability Forum 2018

### How ESG investing creates value and return

5 OCTOBER 2018 – ATHENS, GREECE

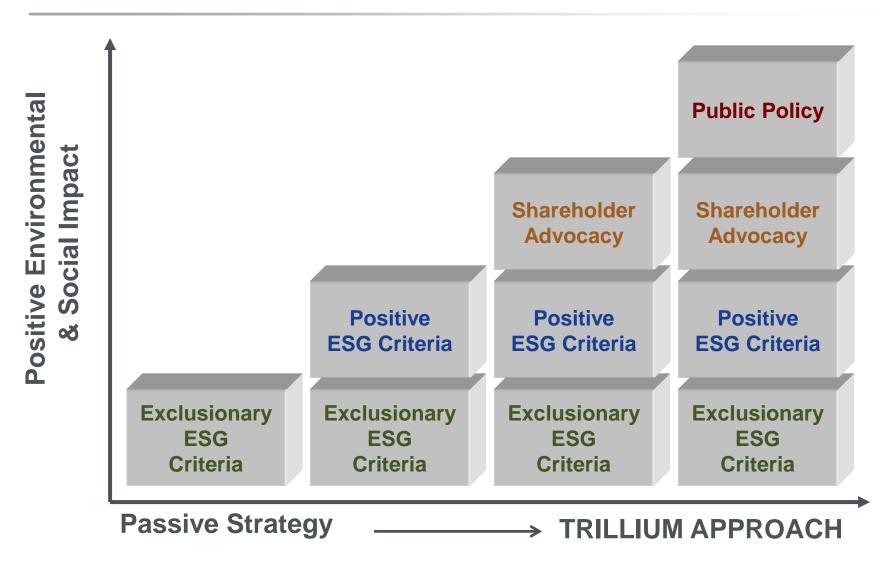
Matthew Patsky, CFA Chief Executive Officer



### TRILLIUM OVERVIEW

- Boston based investment firm started in 1982
- \$2.6 billion in assets under management plus over \$300 million in modeldriven platform assets
- Oldest investment advisor exclusively focused on sustainable and responsible investing (SRI)
- 45% individual / 55% institutional
- Mutual funds and separately managed accounts
- Employee owned, with broad distribution of shares
- Four person dedicated shareholder advocacy team

# MULTIPLE APPROACHES MAXIMIZE SOCIAL DIVIDENDS<sup>SM</sup>



#### CURRENT ADVOCACY PRIORITIES

- Climate Change
- ESG Disclosure
- Gender Diversity on Boards
- Indigenous Peoples' Rights
- Labor and Human Rights
- Political / Lobbying Spending Disclosure
- Privacy Rights
- Responsible Supply Chains
- Sustainable Agriculture
- Workplace Diversity

#### **ACTIVE OWNERSHIP**

Direct Dialogue Shareholder Proposal

Public Policy

### **EXAMPLES**













## INVESTOR LETTER EXAMPLE: MERCK & CO.

August 2017 – Trillium joined our investor partners Interfaith Center for Corporate Responsibility (ICCR) as signatories of a letter to CEO Kenneth Frazier applauding him for his leadership in resigning from President Donald Trump's American Manufacturing Council.

#### Northwest Coalition for Responsible Investment

A collaborative venture of:

Adrian Dominican Sisters - Benedictine Sisters of Cottonwood, Idaho - Benedictine Sisters of Mt. Angel Congrégation des Soeurs des Saints Noms de Jésus et de Marie - Northwest Women Religious Investment Trust Jesuits West- Peachelath - Providence Health & Services

Sisters of the Holy Names of Jesus & Mary, US Ontario Province - Sisters of Providence, Mother Joseph Province Sisters of St. Francis of Philadelphia - Congregation of Sisters of St. Joseph of Peace Sisters of St. Mary of Oregon - Tacoma Dominicans

August 15, 2017

Kenneth C. Frazier, CEO & Chair Merck & Co. 2000 Hill Road Kenilworth, NJ 07033

Dear Mr. Frazier.

For over 25 years shareholders of the Interfaith Center on Corporate Responsibility, who are "inspired by faith and committed to action," have engaged Merck on issues of access to health in the US and globally. Together we have encouraged one another to live our values of integrity, diversity and the common good.

On Monday you exemplified for us how a value-driven leader acts when you courageously stood up and rejected "expressions of hatred, bigotry and group supremacy, which run counter to the American ideal that all people are created equal."

We applaud your decency and leadership and support your resignation from the President's American Manufacturing Council.

With gratitude

Judy Byron, OP

Judy Byron, OP

Adrian Dominican Sisters

Northwest Coalition for Responsible Investment

Barbara Aires, SC

Sisters of Charity, Halifax

Sisters of Charity os St. Elizabeth, NJ

Catherine Cartier

Helen Bellew, SNDdeN

Progressive Asset Management

Sisters of Notre Dame de Namur

John Celichowski, OFM Cap. Capuchin Province of St. Joseph

Michaele Birdstall

Mary Brigid Clingman, OP

American Baptist Home Mission Society

Dominican Sisters ~ Grand Rapids

Mara Bolis Oxfam

Vicki Cummings, CFO

Sisters of the Holy Names of Jesus and Mary, U.S.-

Ontario Province

Mary Burns, SC



a program of: Intercommunity Peace & Justice Center

1216 NE 65<sup>th</sup> Street Seattle, WA 98115 • phone: 206-223-1138 • fax: 206-223-1139 • e-mail: jbyron@ipjc.org

Source: Interfaith Center for Corporate Responsibility



#### DISCLOSURE

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