

# Global Sustain Group Sustainability Forum 2018

## How ESG investing creates value and return

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5 OCTOBER 2018 – ATHENS, GREECE

Matthew Patsky, CFA  
Chief Executive Officer



**TRILLIUM ASSET MANAGEMENT®**

Two Financial Center | 60 South Street, Suite 1100 | Boston, MA 02111 | 617-423-6655

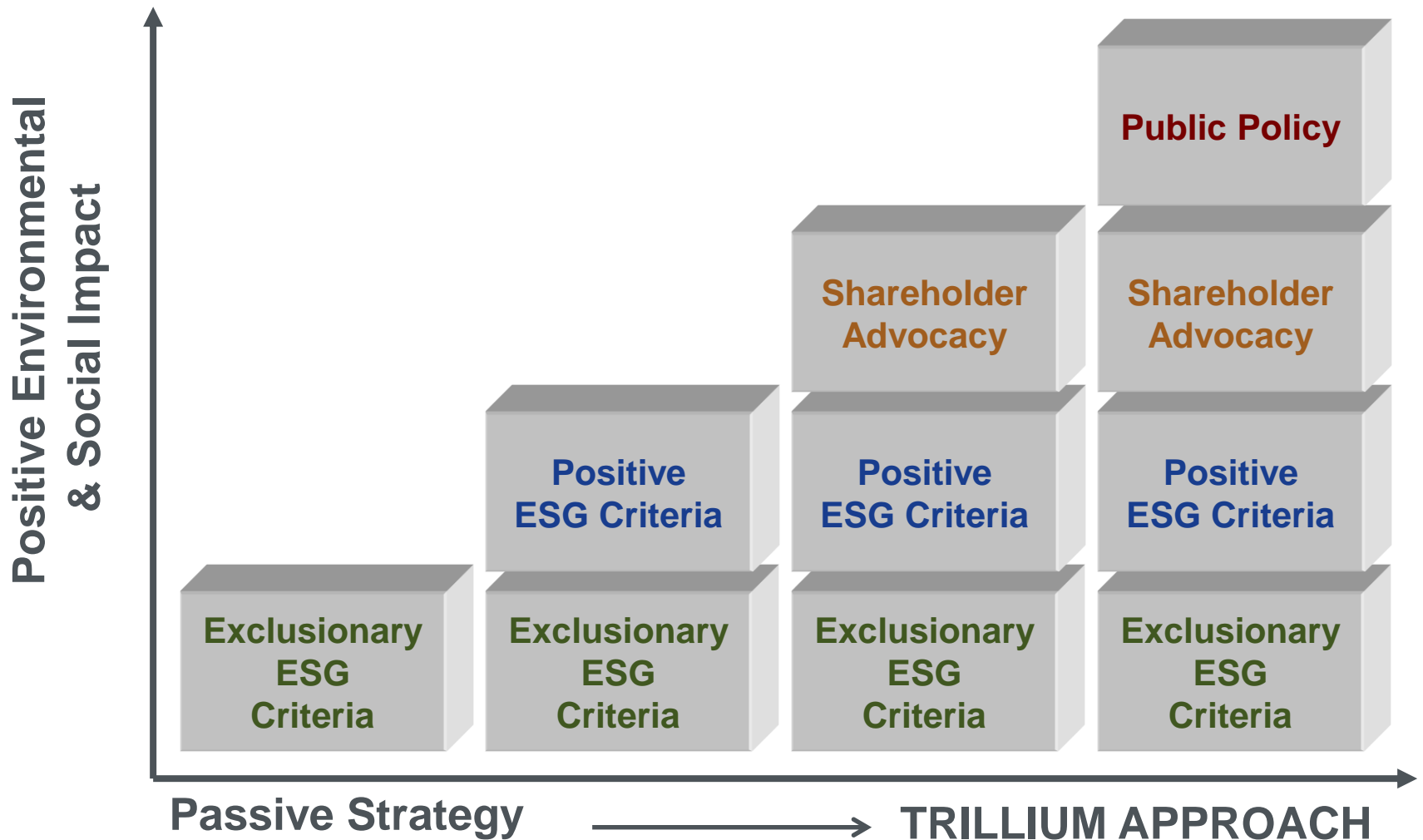
[www.trilliuminvest.com](http://www.trilliuminvest.com)

# TRILLIUM OVERVIEW

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- Boston based investment firm started in 1982
- \$2.6 billion in assets under management plus over \$300 million in model-driven 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

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- **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

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Direct  
Dialogue

Shareholder  
Proposal

Public  
Policy

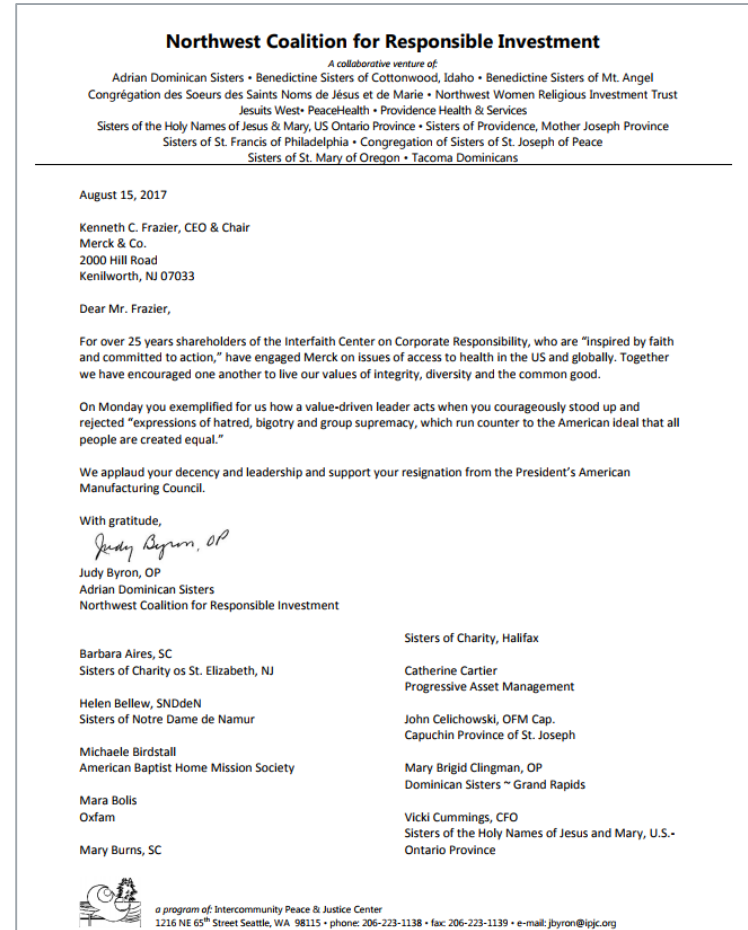
# EXAMPLES

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# 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.



Source: Interfaith Center for Corporate Responsibility

# DISCLOSURE

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