



Resource Room – EGA Fall Retreat  
Listing of Investment Firms and Organizations  
Location: Rock Reading Room and Alcove



**As You Sow**

As You Sow provides shareholder advocacy management and proxy voting services to the non-profit, socially-responsible investment, and foundation communities. Shareholder Advocacy services include: research and strategic planning, coalition building, leading company dialogues, filing shareholder resolutions, conducting solicitation campaigns, speaking at annual meetings, development of education materials and expert briefings for company management and proxy analysts, and conducting media outreach. Proxy Consulting services include: vetting environmental and social proxy votes and investment portfolio holdings related to missions and programs, identifying links between investment portfolios and grantee activities, providing templates and developing proxy voting guidelines.

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**Boston Common Asset**

Boston Common Asset Management is a full service, employee-owned social investment firm dedicated to the pursuit of financial return and social change. It offers individual and institutional investors an unrivaled range of customized portfolio management products, designed to meet all of our clients' diverse investment needs under one roof. It complements prudent portfolio management with a unique blend of customized social screening and shareholder advocacy.

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**CERES**

Ceres is a national network of over 100 investment funds, environmental organizations, labor unions and other public interest groups working to increase corporate responsibility. Formed in 1989, Ceres created the Ceres Principles, a pioneering 10-point code of corporate environmental conduct that led to widespread adoption of environmental principles by corporations worldwide. In 1997, Ceres launched the Global Reporting Initiative (GRI), which has become the internationally established standard for corporate reporting on the “triple bottom line” of economic, social and environmental performance.

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## **E+Co**

Clean energy has the power to combat climate change and fuel progress worldwide. Throughout Africa, Asia and Latin America, E+Co supports clean energy by cultivating and investing in local energy businesses. These businesses, in turn, preserve natural resources, expand income, reduce air pollution and light poor households. For 15 years our market-driven approach has leveraged the immense power of local entrepreneurs to create a cleaner, healthier and more prosperous planet.

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## **Federal Street Advisors**

Federal Street Advisors delivers comprehensive investment consulting services to a select group of individual, family, and institutional clients. The firm provides sophisticated investment advice and expert financial solutions tailored to meet the unique needs of each client it serves. The firm's two practice areas serve individuals and families as well as foundations and non-profit organizations. Founded in 1991 and independently owned and managed, the firm combines deep resources with small firm flexibility and attentiveness to deliver objective, unbiased investment advice to a list of 70 ultra high net worth family and foundation clients with over \$3.5 billion in assets under advisement.

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## **Green Century Funds**

Founded by a partnership of non-profit environmental advocacy organizations, the Green Century Funds are an open-end, diversified, no-load family of environmentally conscious mutual funds. Green Century provides people who care about a clean, healthy planet the opportunity to use the clout of their investment dollars to encourage environmentally responsible corporate behavior.

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## **Innovest Strategic Value Advisors**

Innovest Strategic Value Advisors is the #1-ranked provider of extra-financial research for the investment community. Innovest specializes in analyzing companies' performance on environmental, social, and strategic governance issues, with a particular focus on their impact on competitiveness, profitability, and share price performance. Innovest uses its proprietary rating methodology and databases to evaluate the performance of over 2200 large, publicly-held global companies on these issues. By identifying differences in risk and management capabilities, Innovest's ratings uncover hidden risk and value potential for investors.

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## **IW Financial**

IW Financial is a leading provider of environmental, social, and governance (ESG) research, consulting, and portfolio management solutions for asset management firms, managed accounts sponsors, institutional investors, plan sponsors, and investment advisors. The firm's expertise positions clients to benefit from two of the major trends shaping the financial services industry today: demand for issues-based stock screening, and growing interest in highly customized investment portfolios that reflect the values of an institution or an individual.

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## **Money with a Mission/First Affirmative Financial Network**

First Affirmative's Sustainable Investment Solutions™ focus on stocks, bonds, and mutual funds that are having a positive social and environmental impact. Our investment services also integrate the other two elements of an SRI investor: shareholder advocacy and community investing. You'll learn how to challenge and influence the behavior of large public corporations, making them better corporate citizens. We'll also introduce you to community investments that promote sustainable development in economically disadvantaged local communities in the United States and throughout the world.

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## RBC Wealth Management

RBC Wealth Management is a division of RBC Capital Markets Corporation, which is a wholly owned subsidiary of Royal Bank of Canada. RBC Capital Markets Corporation is the nation's eighth largest full-service securities firm and serves individual investors and small business owners throughout the United States, and capital markets and correspondent clients in select U.S. and European markets.

RBC Wealth Management has more than 1,700 financial consultants in 145 offices located in 39 states from coast to coast. We link our success over the past 90 years to our ability to develop long-term relationships with our clients. By providing an experienced, consultative approach, we match the most appropriate investments to our clients' unique needs.

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## Trillium Asset Management

For twenty-five years and with \$1 billion in assets under management, Trillium Asset Management Corporation ("Trillium") has been a leader in social and environmental investing. Trillium seeks to offer investors the strongest combination of personalized service, a history of competitive investment results, and a long and unique tradition of committed social activism. Clients include high net worth families, foundations, churches, endowments, and other non-profit organizations. Trillium is employee owned and is Co-founder of Ceres and the Social Investment Forum.

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## Trucost

Trucost Plc is an environmental research organisation which helps companies and investors understand the environmental impacts of business activities. Trucost provides data and analysis on company emissions and natural resource usage. It presents these in financial as well as quantity terms, providing the basis for an improved dialogue between companies, investors and other stakeholders. Trucost offers expert advice and research to major corporations, both public and private, institutional investors and to Government departments and associated agencies.

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### **Veris Wealth Partners**

Veris Wealth Partners (VWP) is an independent, SEC registered, wealth management firm founded by five partners who share a deep conviction in the interdependence of values and wealth. VWP believes managing that interdependence with knowledge and wisdom delivers benefits for individuals, companies and society. Its clients are individuals, foundations, non-profit organizations, family offices and wealth management firms. They have national offices in New York, San Francisco, and Portsmouth, NH.

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