TRILLIUM OVERVIEW

• Sustainable and Responsible Investment (SRI) since 1982
• Goal: deliver both impact and performance to our investors
• Products: Sustainable Opportunities Fund (green solutions/economic empowerment/healthy living –focused) among fastest growing funds
• Active Shareholder Engagement: Dialogue, Proxy Process and Public policy work to influence corporate practices on environmental issues
• Increased interest in Supply chain risks – brings chemical management into sharper focus

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*This figure includes model assets and is provided as supplemental information.
VALUE PROPOSITION OF CFP TO INVESTORS

• CFP fills in data gaps: provides inputs and benchmark comparisons for analysts

• Platform for substantive shareholder engagement and policy disclosure

• Value to “Universal Owners” : CFP addresses costs to economy growth. Large institutional investors hold slice of productive capital in economy. Drags on global economy (ie higher health and lost work costs from exposure to harmful chemicals) impact financial returns.
HOW INVESTORS CAN USE RESULTS FROM CFP

• Better evaluate and benchmark chemical management

• CFP data informs several materiality measures:
  • Product safety & quality
  • Chemical safety
  • Supply chain labor standards

• Prod more companies to follow industry leaders with transparency & improving chemical safety
  • full menu approach vs. one chemical at a time
HOW INVESTORS CAN USE RESULTS FROM CFP

• Reduce uncertainty in the marketplace
  • CFP = feedback platform for companies and investors
  • Methodology offers continuous improvement of data usability and quality
  • Methodology offers visibility of risk issues and safer alternatives

• SRI assets + 76% in two years. CFP is a valuable tool for growing investor interest.
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