

SUSTAINABLE INVESTING SERVICES

Your organization's investments should be as socially conscious as your organization's objectives. Through the specialized expertise of our Foundation & Institutional Advisors (FIA) practice and Northern Trust Investments, Inc., Northern Trust can help you learn about sustainable investing concepts and their impact. We will work with you to thoughtfully develop and implement a strategy that aligns your mission, social goals and environmental stewardship with your portfolio's investment objectives.

LEVERAGE OUR EXPERTISE TO IMPLEMENT YOUR GOALS

Foundation & Institutional Advisors exclusively serves foundations, endowments and other nonprofit institutional investors as either a dedicated investment advisor or as a fully outsourced chief investment officer. FIA acts as an extension of your team to understand your goals and objectives around responsible investing, and then collaborates with you to build portfolios aligned with your core standards. We can:

- Help your organization understand the landscape of responsible investing strategies and provide insight into approaches taken by organizations similar to yours.
- Work with you to articulate your goals into an investing strategy.
- Advise on how this strategy should inform portfolio construction.
- Provide information about different asset class tools.
- Help embed language in your investment policy statement, investment guidelines and talking points to share with your constituents, donors and other interested parties.

Why Northern Trust

- **A World's Most Ethical Company**
Ethisphere Institute, 2017
Fourth Consecutive Year
- **Ranked #1 America's Best Employers for Diversity**
Forbes, 2018
- **Best North America SRI/Social Impact Investing Private Bank –**
Euromoney, 2017
- **“Outstanding” Community Reinvestment Act (CRA) rating**
22 Consecutive Years

INTEGRATE YOUR VALUES INTO YOUR INVESTMENT PROCESS

Sustainable investing has moved beyond simply recognizing and avoiding so-called “sin stocks.” Northern Trust can help you encompass a broader, increasingly sophisticated data set that mitigates risks and captures fast-growing opportunities by building portfolios that reflect your commitment to long-term sustainability, good governance and environmental and social responsibility. Northern Trust’s advantages include:

- Cost-effective access to compelling investment strategies from well-respected investment firms, including Northern Trust Investments, Inc. (see right).
- Unique approach that combines investor values with leading market expertise.
- Innovative solutions ranging from strategies leveraging our deep expertise in passive and proprietary factor-based investing approach to custom indices.
- Shareholder advocacy focusing on engagement through development of internal processes and custom proxy voting policies.
- Team of experts and their track record in developing innovative, client-responsive environmental, social and governance (ESG) solutions.

NORTHERN TRUST INVESTMENTS, INC.’S SPECTRUM OF SUSTAINABILITY SOLUTIONS

- **Negative screening.** Exclusion of stocks in specific industries or geographic areas.
- **Norms based.** Exclusion of stocks based on standards such as the U.N. Global Compact.
- **Best in class.**¹ Strategies that overweight companies that are leaders in implementing environmental, social and governance investing.
- **ESG integration.** Incorporating ESG considerations across business activities and investments.
- **Thematic investing.** Investing in broad ESG themes, such as low carbon.
- **Investment styles.** Passive, factor-based, tax advantaged, custom.

Northern Trust Investments, Inc.’s industry leadership

- More than 30 years managing sustainable investing portfolios
- Advisor for more than \$20 billion in assets in sustainable investing strategies
- Four of the top 15 largest ESG index funds globally²
- Principles for Responsible Investing member since 2009
- Leadership roles in U.N. Principles for Responsible Investment and the Sustainability Accounting Standards Board
- Industry-first funds including sustainable real estate index and Emerging Markets Custom Index and Fund
- Innovative research on factor investing and ESG

Put our expertise to work for you

To learn more about how we can put our experience and resources to work for your organization, contact us today or visit northerntrust.com/FIA. We are ready to help you achieve your mission.

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¹ Best-in-class ESG is industry terminology referring to an investment approach that selects companies that are leaders in implementing ESG.

² eVestment. Data as of June 30, 2017. Universe for comparison consists of 32 total products with the “investment focus” of “Environmental Social Governance” and “portfolio management strategy” as “passive.” Past performance is no guarantee of future results. Index performance returns do not reflect any management fees, transaction costs or expenses. It is not possible to invest directly in any index.

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