

# TRILLIUM OVERVIEW

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- 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

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- 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

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- 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

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- 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.

# CONTACT INFORMATION

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Susan Baker  
Vice President, Shareholder Advocacy

[sbaker@trilliuminvest.com](mailto:sbaker@trilliuminvest.com)

617 532/6681