



**BizNGO 2022 – 17th Annual Meeting:  
Safer Solutions to PFAS & Beyond**



## Trillium Asset Management is an impact-driven, ESG-focused firm – and one of the first dedicated to aligning values with investment objectives

### History:

- Founded in 1982 by ESG pioneer and trailblazer Joan Bavaria
- Joan, with her commitment to sustainable and responsible investing, was a true visionary and served as an early catalyst for change in the investment industry
- The firm's innovative approach led to the creation of numerous organizations, the development of the ESG investment field, and the first generation of investors focused on improved environmental, social, and governance outcomes

### Today:

- Trillium is an impact-driven, ESG-focused firm dedicated to aligning values with investment objectives
- The firm's dedication to impact has influenced thousands of companies around the world to create concrete, positive, social and environmental change on a global scale
- Perpetual Limited, an Australian Financial services company acquires Trillium Asset Management and re-affirms commitment aligning values and mission for clients on a global scale

**“ We honor Joan’s legacy and pioneering approach by putting performance to work for the betterment of society.”**

– Matthew W. Patsky, CFA  
CEO & Portfolio Manager

### Members of:



Multiple Approaches Maximize Social Dividends<sup>SM</sup>

