

INVESTING SUSTAINABLY

For clients devoted to creating a healthy planet and just society



Zevin Asset Management

About Zevin Asset Management

Zevin Asset Management is a Boston-based investment manager founded in 1997 to manage sustainable and responsible portfolios for individuals, families, nonprofits, and faith-based institutions. Our mission is to deliver competitive returns, help clients align their investments with their values, and leverage our power as investors to build a more equitable future.

OUR CORE VALUES

- Intellectual curiosity, creativity, and collaboration lead to investment excellence
- Dedication to environmental, social, and governance change
- Integrity, humility, and an unwavering commitment to client service

OUR UNIQUE, AUTHENTIC APPROACH

FINANCIAL ANALYSIS & SUSTAINABILITY

Our experienced investment team combines economic and financial analysis with sustainability in our investment process to build durable, diversified global portfolios.

RISK MANAGEMENT

Our investment philosophy and process are deeply rooted in the belief that taking less risk can lead to better returns for our clients over time. Our investment process incorporates environmental, social, and governance (ESG) analysis as one of the means to help reduce risk.

ADVOCACY

We actively employ shareholder advocacy and corporate engagement to help enhance shareholder value and create a positive social impact.

OUR SERVICES

We manage client portfolios through customized, separately managed accounts of active stock and fixed-income allocations that seek capital appreciation. We are proactive in our service to our clients, steering them toward a better understanding of their investments and their responsibilities. We take as much time as is required to meet with each client, ask questions, and fully understand their risk tolerances and investment objectives, along with their ethical values and concerns. Because we are a boutique firm, we are able to offer individualized services and tailor our offering to your needs.

Working for Impact

At Zevin Asset Management, we're differentiated from many of our peers and the broader investment industry. In addition to our unique and authentic approach to socially responsible investing and reducing risk in our clients' portfolios, we demonstrate our commitment to social responsibility in the makeup, structure, and conduct of our firm.

OUR PEOPLE

Our talented team members bring diverse backgrounds, and educational and professional experiences to our investment process. Most have cut their teeth at larger firms and made the career decision to shift to a firm with both a successful investment process and a strong culture that better reflects their values. Our team-based investment process ensures that we consider multiple perspectives in each decision, which is a competitive advantage. In the investment field, a myriad of perspectives informs a wider range of risk considerations, which leads to better investment decisions and portfolio returns. Furthermore, this approach prevents a "star culture," which depends on a single person, from developing.

OUR STRUCTURE

Zevin Asset Management is a 100% employee-owned, majority women-owned and -led firm that emphasizes diversity in its hiring practices. We believe that a more diverse, equitable, and inclusive workforce will help us better capitalize on market opportunities and reinforces our commitment to social responsibility as a firm. Even more unique is our philosophy of gifting ownership units to all tenured employees every two years. Our compensation structure serves to align employees with the success of the firm, rather than encourage internal competition, and strengthens a culture of collaboration.

WALKING THE WALK

As a Certified B Corporation, Zevin Asset Management is committed to using our business as a force for good, and we practice what we preach to our portfolio companies. We're proud to be a Certified B Corporation, meeting the highest standards of verified social and environmental performance, public transparency, and legal accountability.

OUR CLIENTS

For decades, our firm has helped clients from faith-based institutions to foundations to families across the country grow their assets while seeking a healthy planet and an equitable society. Our clients understand that financial markets don't exist in isolation from social or environmental challenges.

Investment Management Services

Zevin Asset Management offers socially responsible investment portfolios that are customized to help our clients achieve their financial goals while being true to their values. If you have been considering investing more responsibly, we're here to help you follow through and fulfill your intentions.

OUR INVESTMENT APPROACH

Investing is a risky business, so managing risk is the centerpiece of our investment approach. We evaluate **macroeconomic risks**, **fundamental risks**, and **ESG risks** in all of our investment analysis. We believe that analyzing and managing risk across asset classes, regions, and sectors is what drives competitive performance. We invest globally because diversification tends to result in less volatility across investment cycles and provides more ability to find undervalued investment opportunities.

OUR RESEARCH PROCESS

It's important for any global investor to consider macroeconomics to optimize a portfolio. Our modeling and analysis help us understand which regions and industries may provide more opportunities or risk.

**TOP-DOWN
MACROECONOMIC
ANALYSIS FROM
OUTLOOK**

The integration of ESG research helps us identify risks and opportunities, ensures that fundamentally attractive companies fit our sustainability criteria, and pinpoints potential issues to address in our advocacy work.

Our process of active ownership enhances shareholder value and our clients' impact.

**ESG
INTEGRATION**

The heart of our process is conducting rigorous fundamental research in high-quality businesses with attractive growth prospects, consistent profitability, strong balance sheets, and enduring competitive advantages.

**FUNDAMENTAL
ANALYSIS OF
A STOCK**

What Sets Us Apart

WE ARE A BOUTIQUE FIRM

Zevin Asset Management's offering is not a one-size-fits-all service. We're here to tailor clients' investments to their goals and walk them through their finances (without investment jargon). Most of our business comes from word-of-mouth because we take the time to get to know our clients and are committed to helping make their aspirations a reality.

WE ARE SOCIALLY RESPONSIBLE

In an investment sphere that is increasingly being "green-washed," Zevin Asset Management is the real deal. We're an authentic SRI firm that has been practicing socially responsible investing for over 25 years. Our goal is to help you truly align your investments with your values — such as economic justice, human rights, and climate action — because they're our values too. We think it's important to **walk the walk** and hold ourselves to the same high standards as the companies in which we invest. We're proud to be a **Certified B Corporation**, meeting the highest standards of verified social and environmental performance, public transparency, and legal accountability.

WE ARE A FEE-ONLY INVESTMENT ADVISOR

Above all, our job is to help you protect and grow your money. As a fiduciary firm, we're duty-bound to put your financial interests first — and we wouldn't have it any other way. Protecting your capital is what we do best. But that's not all we do. As an advisory firm, we're here to coach and educate you through any number of financial situations and future considerations. We gain great satisfaction in helping you work through financial challenges. We know that your needs may change over time and we can adapt to best meet whatever challenges may come.

WE WILL . . .

- **Work with you to develop an Investment Policy Statement (IPS).** The IPS breaks down the client's goals, values, and other important considerations that enable us to create a customized portfolio.
- **Manage your portfolio according to your goals** with a fiduciary duty to act in your best interests.
- **Offer a dedicated portfolio manager to manage your portfolio**, choosing and selling individual securities on your behalf.
- **Advise on the appropriate asset allocation and withdrawal strategies**, and rebalance portfolios when necessary.
- **Meet with you** in person, over video call, or on the phone at your convenience.
- **Deliver personal, quarterly performance updates** via a secure online portal, as well as periodic investment commentaries and updates on advocacy activities.
- **Draw on our decades of experience** in advocacy to push companies to be better on your behalf.

We know that managing investments can be stressful and want to help. Let us worry about your investments so that you don't have to — it's what we're here for.

DISCLOSURES

- Registration with the SEC should not be construed as an endorsement or an indicator of investment skill, acumen or experience.
- Investments in securities are not insured, protected or guaranteed and may result in loss of income and/or principal.
- Historical performance is not indicative of any specific investment or future results.
- Industry recognitions or awards should not be construed as an endorsement or a recommendation to retain Zevin Asset Management by the ranking entity or any regulatory authority.
- Zevin Asset Management is not licensed to provide and does not provide legal, tax or accounting advice to clients. Advice of qualified counsel or accountant should be sought to address any specific situation requiring assistance from such licensed individuals.
- Companies that undergo B Corp certification commit to being a business that balances purpose and profit. Zevin Asset Management pays annual membership dues to B Lab, which is a requirement for eligibility for B Corp certification. B Lab results are, at least in part, based on responses provided by Zevin Asset Management.



Zevin Asset Management

Managing Sustainable & Responsible Portfolios Since 1997



100% POST-
CONSUMER,
PROCESS
CHLORINE-
FREE PAPER

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or 617-742-6666. Visit our website zevin.com and join us on
LinkedIn (Zevin Asset Management) and Twitter (ZevinAssetMgmt).



Certified

