

High Impact Advocacy Report

Our dedication to comprehensive analytics and unwavering commitment to authenticity are the guiding forces behind our endeavor to construct portfolios comprised of diligently managed, forward-looking enterprises.

At The Wealth Consulting Group, our investment philosophy is firmly rooted in harmonizing our financial pursuits with our core values. We champion enterprises that purposefully allocate their resources and actively participate in advocating for their stakeholders. Their persistent involvement and advocacy serve as the driving forces behind instigating positive social and sustainable transformations across the globe and within communities, all while concurrently generating profits.

Our portfolios invest in companies that are:

- Developing innovative solutions to global sustainability challenges
- Promoting gender, ethnic, and lifestyle diversity
- Supporting community-based financial institutions that promote small businesses, health care, education and housing
- Actively involved in shareholder advocacy and public policy engagement to encourage companies to improve their ESG (Environmental, Social, and Governance) commitments

Our Partnerships - A Positive Impact

CALVERT Research and Management has a long history of engaging with corporations to support their health and sustainability in global markets and improve their investment returns. As a responsible investor, Calvert examines contemporary global challenges, evaluates corporate strategies in addressing them, and deploys capital strategically to propel constructive transformations and fortify their invested enterprises.

- **PACCAR** is a major truck manufacturer. Calvert's ongoing partnership with PACCAR has driven remarkable progress in combating climate risk and slashing greenhouse gas emissions. Leading the CA100+ initiative, Calvert's influence has been pivotal in guiding PACCAR toward significant change. In 2021, PACCAR's momentous commitment to a certified Science Based Target resulted in a comprehensive reduction of GHG emissions, encompassing scope 3 emissions linked to truck use. Recent endeavors have centered on PACCAR's strategic strides in the burgeoning Zero Emission Vehicle market, exemplified by seven battery electric models and substantial R&D investments.



GREEN CENTURY FUNDS met with top executives at more than 60 companies and filed 32 shareholder resolutions to produce results this season. They have helped secure better environmental policies and practices to help companies reduce their material risks and create real-world impacts for their investors.

- **JACK IN THE BOX** committed to eliminating abusive gestation crates for its pork supply by 2026.
- **MORGAN STANLEY** will require all Indonesian palm oil growers seeking financing to have a zero deforestation policy
- **ODP CORPORATION**, which operates Office Depot and OfficeMax, issued a policy to reduce the total amount of packaging of its private label products and e-commerce shipping.



IMPAX ASSET MANAGEMENT gives a lot of energy and resources toward their relationships with investee companies, peers, and policymakers. They believe that stewardship and advocacy are the twin levels that they can pull to influence change and help address the systemic risks facing their investee companies and the real economy.

- **JAPANESE STATE COUNCIL:** Impax's persistent engagement efforts have wielded substantial impact in advancing gender diversity within Japanese company boards. A pivotal collaboration with the Asian Corporate Governance Association (ACGA) culminated in 2022 as Impax contributed to a coordinated letter, ultimately conveyed by the Japanese Financial Standards Authority (FSA) to the Japanese State Council, marking a compelling call for change. Swiftly translating advocacy into action, the Japanese prime minister's April 2023 directive commanded that approximately 1,800 companies listed on the TSE Prime market achieve 30% female board representation by 2030, spotlighting Impax's instrumental role in driving transformative progress and fostering a culture of inclusion across Japanese corporate governance.



NUVEEN is committed to promoting value and/or risk-focused management of critical environmental, social and governance (ESG) factors with portfolio companies, while advocating for consistent, clear, and market-wide ESG reporting and standards.

- **THE WALT DISNEY COMPANY'S** proactive approach to diversity, equity, and inclusion (DE&I) stands as a potent response to the intense competition and heightened scrutiny characteristic of the media and entertainment industry. Recognizing the expanding buying power of minority consumers – which surged from \$458 billion in 1990 to \$3 trillion in 2020, encompassing Black, Asian American, and Native American consumers – Disney strategically aligns its content with evolving customer preferences. Engaging with Nuveen's DE&I initiative, Inclusive Talent Management, Disney underwent a transformation beyond workforce concerns. This evolution led to their resolute emphasis on diversity on and off-screen, encapsulated in their "six pillars," a framework fostering accountability throughout the organization. By advocating transparency, Nuveen influenced Disney's ESG reporting, resulting in nuanced metrics differentiating representation across content segments and influential career levels, further enhancing their ability as investors to assess DE&I's role in business strategy and competitiveness across media and entertainment peers.

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Environmental Social Governance (ESG) has certain risks based on the fact that the criteria excludes securities of certain issuers for non-financial reasons and, therefore, investors may forgo some market opportunities and the universe of investments available will be smaller.