

THE CENTER SOCIAL STRATEGY

The Center Social Strategy is an investment model composed of Environmental, Social, and Governance (ESG) funds designed for conscious investors who want their investment strategy to align with their values.

ESG criteria is a set of standards for a company's operations that socially conscious investors use to screen potential investments.



Environmental

Climate Change
Waste & Pollution
Deforestation



Social

Diversity
Consumer Protection
Animal Welfare



Governance

Executive Board Diversity
Corruption & Bribery
Tax Strategy

Common Methods

There are three common methods for socially conscious investors (we use #3).

1. **Socially Responsible Investing (SRI):** Invests only in projects or companies with the goal of making social change.
2. **Impact Investing:** Invests only in projects or companies to make social or environmental change.
3. **Environmental, Social, and Governance (ESG):** Integrates all three environmental, social, and governance factors when investing.

The Center's Approach: Why ESG?

We take an ESG fund approach to values-driven investing because, unlike SRI and Impact Investing, we feel the risk and performance experience of ESG products are aligned with our standard investments. This is largely because ESG fund managers start with traditional stock valuation methods to assess companies, then overlay Environmental, Social, and Governance analysis to build portfolios.

Investing involves risk and you may incur a profit or loss regardless of the strategy selected. Sustainable/Socially Responsible Investing (SRI) considers qualitative environmental, social and corporate governance, also known as ESG criteria, which may be subjective in nature. There are additional risks associated with Sustainable/Socially Responsible Investing (SRI), including limited diversification and the potential for increased volatility. There is no guarantee that SRI products or strategies will produce returns similar to traditional investments. Because SRI criteria exclude certain securities/products for non-financial reasons, investors may forego some market opportunities available to those who do not use these criteria. Investors should consult their investment professional prior to making an investment decision.

Investors should carefully consider the investment objectives, risks, charges and expenses of mutual funds before investing. The prospectus and summary prospectus contains this and other information about mutual funds. The prospectus and summary prospectus is available from your financial advisor and should be read carefully before investing.