Uncovering What You're Invested In

PREPARATION

- Do you have a brokerage account?
 - If so, find your login information for the online platform
 - If you don't know, you probably don't
- Do you have an individual retirement account?
 - If so, find your login information for the online platform
 - The platform maybe be part of your online benefits center
 - If you can't find it, ask your human resources or benefits officer
- Do you have a pension?
 - See resources under "Institutional Divestment"

STEP 1: Login to your account on the online platform

- Take note of what company manages your platform (i.e. what website are you logging into?)
 - If your platform is managed by one of the divestment targets, consider switching platforms
 - If you are logging into an account provided by your employer, contact your employer's human resources or benefits office and ask them to consider changing platforms; depending on the size of your company, this may not actually be a major ask

STEP 2: Navigate to a page on which you can see the stocks and mutual funds you are invested; there will likely be percentages next to their names

- The page may be labeled: "Your Investments," "Change Investments," "Manage Investments," "Reallocate Investments", or something else; this will vary across platforms
- If you are invested in stocks, you can begin to screen them now
- If you are invested in mutual funds, move on to step 3

STEP 3: Go to https://www.sec.gov/edgar/searchedgar/mutualsearch.htm, search each of your funds, and click on the series number to its left

If the fund does not come up, try searching for the fund name on
 https://www.morningstar.com or even google to find the ticker, a 5-letter unique code; you can then search for the SEC filings using the ticker



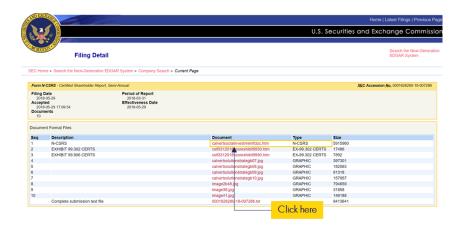
 Note: Some funds will have joint filings with similar funds from the same investment manager



STEP 4: On the next page, scroll until you find the most recent filing labeled "N-CSR" or "N-Q" in the "Filings" column on the left and click on the button labeled "documents" directly to the right of it



STEP 5: On the next page, find "N-CSR" or "N-Q" in the "Type" column and click on corresponding red link directly to the right of it





STEP 6: On the next page, hit ctrl+f to bring up the search box and enter the name of your fund; continue through the results until you see the fund's list of investments

- You begin to screen your stocks now
 - Because of the number of stocks in many mutual funds, it maybe easiest to search for particular companies using ctrl+f
- Remember that there will likely be more than one fund in the document, so make sure
 that you are looking at the investments for the fund you are interested in
- Note: If under investments you find the names of additional funds, you are invested in what is called a "fund of funds." You will need to look up the investments of each fund in your fund of funds individually by starting back at step 3 for each.

