

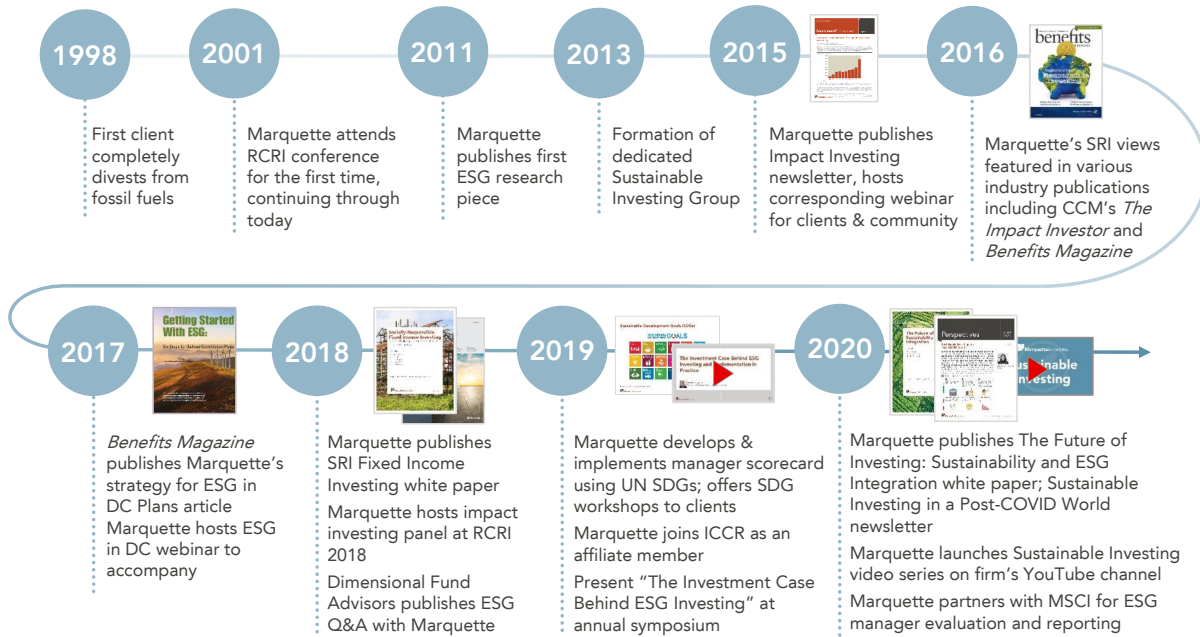
Sustainable Investing

HIGHLIGHTS

Experience
Approach
Evaluation & Reporting

Over 20 years of SRI investment expertise

Marquette has over 20 years of experience working with and guiding our clients to invest in sustainable investment products. Whether using an SRI, ESG, or Impact methodology, our expertise is directly grounded in the missions and objectives of our clients. We are an active voice in the sustainable investment industry through speaking engagements, thought pieces, and participation in advocacy initiatives.



Our Approach

Our approach to sustainable investing begins with a deep understanding of each client's specific values and investment objectives, which oftentimes involves some level of education on sustainability trends. To that end, we start with the investment policy statement — incorporating the client's mission and ensuring that the goals of the client are clearly defined so that all responsible parties understand what is to be achieved. Compliance with the investment policy is equally as important; Marquette serves as the referee in this sense, monitoring the underlying manager's holdings and providing our clients with compliance reporting and sustainability scorecards.



SUSTAINABLE INVESTING CLIENTS¹

83



SUSTAINABLE AUA¹

\$81b

¹ Assets under advisement as of June 30, 2020. A sustainable investing client is defined as a client that has one or more SRI/ESG/Impact investment.

Sustainable Investing Group

Marquette’s dedicated group for evaluating sustainable investing strategies in line with both the investment and social objectives of our mission-based clients was established in 2011. We are active members of the Sustainable Investing community and are thought leaders in the development of new strategies.



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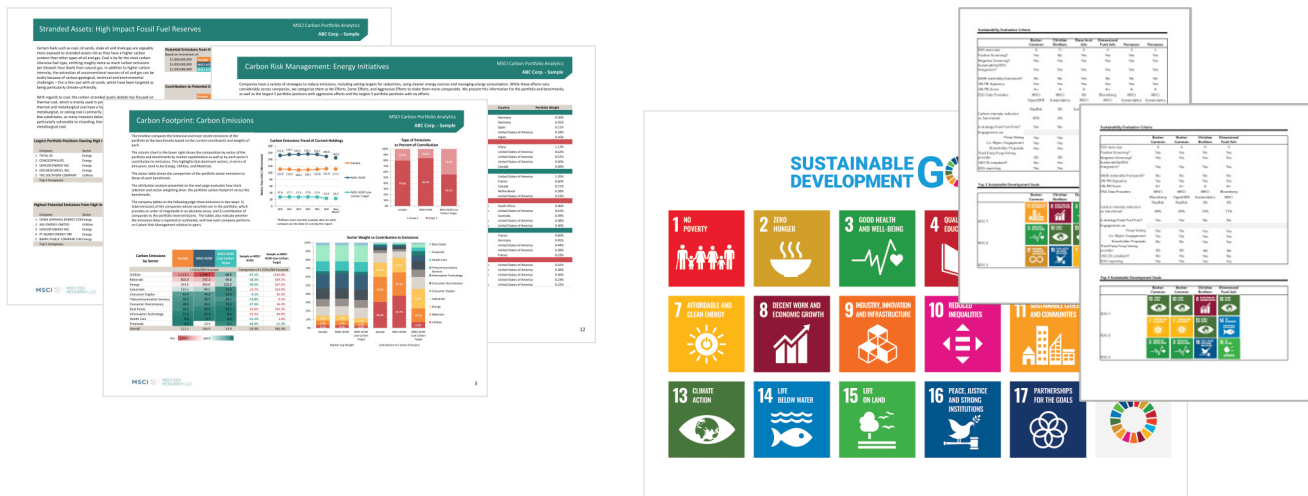


Amanda Gall
Associate Client Analyst

Evaluation & Reporting

Marquette’s commitment to providing sustainable investing solutions for its clients is reflected in the continued enhancement of our evaluation and reporting capabilities. ESG evaluation criteria is included in our investment manager searches as part of the initial due diligence process and most recently we have integrated third-party analytics to provide portfolio-level insight and reporting across a number of ESG factors.

In recent years, the UN’s Sustainable Development Goals (SDGs) have emerged as the leading framework for reporting, serving as the “universal language” when incorporating ESG into the investment process at the asset owner, asset manager, and underlying issuer levels. As such, Marquette has developed customized workshops aimed at educating asset owners on use of the SDGs and aligning a client’s investment objective and mission with these SDGs. We have also incorporated the SDGs as part of our initial manager due diligence process and ongoing evaluation criteria.



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