







# Sustainable Investing

**HIGHLIGHTS**

Experience  
Approach  
Evaluation & Reporting

## Over 20 years of sustainable 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.

1998	2001	2013	2016	2017	2019
First client completely divests from fossil fuels	First year attending RCRI conference, continuing through today	Formation of Sustainable Investing Group	SRI views featured in various industry publications including CCM's <i>The Impact Investor</i> and <i>Benefits Magazine</i>	ESG in DC Plans article published by <i>Benefits Magazine</i> ; ESG in DC webinar to accompany	Development & implementation of UN SDGs manager scorecard Join ICCR as affiliate member "The Investment Case Behind ESG Investing" at annual symposium
2020	2021	2022	2023	2024	
Partnership with MSCI for ESG manager evaluation and reporting Founding member of the Institutional Investing Diversity Cooperative (IIDC) Sustainable Investing video series on YouTube	Sustainable Investing Post-COVID article published by <i>Benefits Magazine</i> USCCB Guidelines expertise consultation Founding member of the Investment Consultants Sustainability Working Group – United States (ICSWG-US)	Hire dedicated sustainable investing research analyst "Incorporating the Values of the SDGs into Your Portfolio" panel at RCRI 2022 "Pricing Power: The Relationship Between Inflation and ESG" at client symposium	Contributed to ICSWG-US guidance on Net Zero considerations for Asset Owners Enhanced manager due diligence process to consider additional sustainability factors "Climate Change, Diversity, Equity and Inclusions: Risks and Opportunities in Investments" panel at RCRI 2023	Participated in the Endowment Impact Benchmark (EIB) Collaborated with the Impact Integration Project on a sustainable investing case study DEI manager search questionnaire development	
 	 	 	 	 	

## 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 CLIENTS

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SUSTAINABLE AUA

\$113B

AS OF DECEMBER 31, 2024

A sustainable investing client is defined as a client that has sustainable investing language in their investment policy statement.

## Sustainable Investing Group

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



**Linsey Schoemehl Payne**  
Chief Compliance Officer,  
Managing Partner  
COMMITTEE CHAIR



**David Lewandowski**  
Research Analyst,  
Sustainable Investing



**Nat Kellogg, CFA**  
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**Tim Burdick, CFA**  
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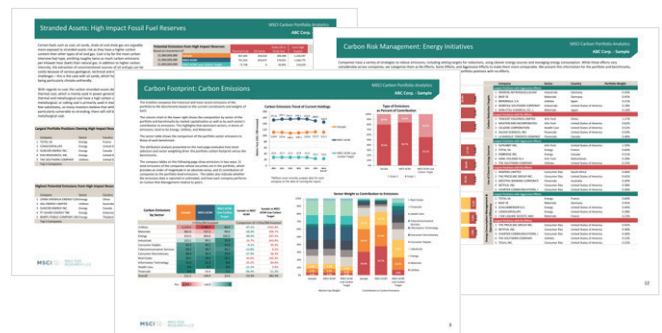


**Alejandro Mendez**  
Senior Performance Analyst

## Evaluation & Reporting

Marquette’s commitment to providing sustainable investing solutions for our 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 them. We also incorporate the SDGs as part of our initial manager due diligence process and ongoing evaluation criteria.



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