



## Trillium Honored as 2017 SMA 'Impact' Manager of the Year

**Boston, MA // May 5, 2017** – Envestnet, Inc. and *Investment Advisor* magazine announced Trillium Asset Management's Small/Mid Cap Core (SMID) strategy as the recipient of this year's Separately Managed Account (SMA) Managers and Strategists of the Year Award in the Impact category. The Impact award recognizes a "best-in-class" portfolio manager that integrates environmental, social, and governance (ESG) factors into the investment process. The award was presented at the 13<sup>th</sup> Annual Envestnet Advisor Summit near Dallas, Texas and accepted by Trillium CEO, Matthew Patsky.

Envestnet | PMC, the portfolio consulting group of Envestnet, evaluates nominees based upon a systematic methodology that considers criteria including performance, firm profile, customer services, investment process, and other quantitative and qualitative factors.

"I am proud of the investment team behind the SMID strategy," said Matthew Patsky, CEO of Trillium Asset Management. "Since 2001, our portfolio managers and analysts have worked together to select companies that demonstrate leadership on material ESG issues and may be best positioned to outperform over the long-term."

"I am very excited that our strategy was selected for the award," said Laura McGonagle, Lead Portfolio Manager for SMID. "There are many challenges in incorporating ESG into SMID company selection, but we believe our approach demonstrates commitment to success."

In addition to evaluating SMID companies' leadership on ESG issues, Trillium exercises its right as a shareholder to file shareholder proposals on critical ESG issues we believe have real financial value. For 35 years, Trillium has used shareholder advocacy to both change company behavior and create value for investors.

**Disclosure:** *This award is not indicative of the future performance of the SMID strategy or Trillium Asset Management. Past performance is not guarantee of future results. The award winner is chosen from more than 1,400 SMAs and strategists available on the Envestnet platform. Each portfolio must have at least a three-year track record and at least \$200 million in assets invested in the strategy. These strategies must be widely available to advisors and their end clients on multiple platforms. One manager was chosen from the managers under consideration or less than 1% of managers.*

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### About Trillium Asset Management

Founded in 1982, Trillium Asset Management is an investment management firm with over \$2 billion in assets under management. Trillium integrates Environmental, Social, and Governance (ESG) factors into the investment process as a way to seek to identify companies better positioned to deliver strong, long-term performance. Trillium has a long history of managing equity and fixed income portfolios for individuals, foundations, endowments, religious organizations, and other non-profits. For more information, visit [www.trilliuminvest.com](http://www.trilliuminvest.com).