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Trillium Celebrates 20 Years Fossil Fuel Free

Trillium is among the oldest investment advisory firms exclusively focused on environmental, social and governance (ESG) investing with over 35 years of experience. Environmental responsibility has been, and remains, a key focus at Trillium. Trillium's Global Equity strategy, one of the Firm's three Fossil Fuel Free investment strategies, has begun celebrating its 20th anniversary year. Trillium's CEO and Co-Portfolio Manager of the strategy, Matt Patsky, reflects on this significant milestone.

"When this strategy launched in 1999, the human influence on the global climate was just becoming evident. Since that time, we have seen a global transition towards a more sustainable economy, fueled by numerous research studies that point to the risks associated with climate change. A number of recent events have served to heighten the awareness of the dire climate crisis. From nation-wide climate strikes to broad media coverage of the fires in the Amazon rainforest, the need for global unity and change has never been more apparent than now. That is why we are extremely proud to manage a product that has been challenging the drivers of climate change for the past 20 years. Our annual carbon analysis shows that we are delivering a product that is significantly less carbon intensive than its benchmark.¹ Furthermore, the strong 20-year track record of our Global Equity strategy demonstrates that there are companies across the globe that are meeting their obligations to their shareholders by delivering strong returns while adapting to the global need for new, resilient, and environmentally sustainable products and services."

The Global Equity strategy is designed to provide a diversified equity portfolio that avoids the energy sector while seeking to maximize investor return with a team experienced in evaluating fundamental financial metrics in addition to environmental, social and governance factors. The strategy's ESG criteria reflect the strategy's overarching Principles for Investment and were inspired by the concept of an Ecological Footprint as well as The Natural Step, a sustainability framework.

The Global Equity strategy is available as a mutual fund. This communication describes the strategy, not the fund. Trillium Asset Management, LLC ("Trillium") serves as the investment advisor to the Trillium Mutual Funds. For more information, please visit the [Trillium Mutual Funds](#) website.

¹As of 03/30/2019, Trillium Asset Management Impact Report shows the strategy is 55% less Carbon Intense than its benchmark, the MSCI ACWI (All Country Work Index). The MSCI ACWI is a market capitalization weighted index designed to provide a broad measure of equity-market performance throughout the world. The MSCI ACWI is maintained by Morgan Stanley Capital International (MSCI), and is comprised of stocks from both developed and emerging markets. It is not possible to invest directly in an index. Past performance is not an indicator of future performance.