

Date range covered : 07/01/2024 to 06/30/2025

LOCATION(S): UNITARIAN UNIVERSALIST ASSOCIATION

INSTITUTION ACCOUNT(S): ALL INSTITUTION ACCOUNTS

Snowflake Inc.

Meeting Date: 07/02/2024	Country: USA	Ticker: SNOW	Proxy Level: 3
Record Date: 05/07/2024	Meeting Type: Annual	Meeting ID: 1869119	
Primary Security ID: 833445109	Primary CUSIP: 833445109	Primary ISIN: US8334451098	Primary SEDOL: BN134B7
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 3,542	*Shares on Loan: 0	Shares Instructed: 3,542	Shares Voted: 3,542

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Benoit Dageville	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. WITHHOLD votes are warranted for Governance Committee member Mark Garrett given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the governing documents and the classified board structure, each of which adversely impacts shareholder rights.</i>						
1b	Elect Director Mark S. Garrett	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. WITHHOLD votes are warranted for Governance Committee member Mark Garrett given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the governing documents and the classified board structure, each of which adversely impacts shareholder rights.</i>						
1c	Elect Director Jayshree V. Ullal	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 23.60 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Declassify the Board of Directors	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because the declassification would enhance board accountability.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	3,542	3,542
			06/20/2024	06/20/2024	06/26/2024		
Total Shares:						3,542	3,542

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Meeting Date: 07/10/2024	Country: USA	Ticker: IOT	Proxy Level: 3
Record Date: 05/17/2024	Meeting Type: Annual	Meeting ID: 1872487	
Primary Security ID: 79589L106	Primary CUSIP: 79589L106	Primary ISIN: US79589L1061	Primary SEDOL: BPK3058
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 6,858	*Shares on Loan: 0	Shares Instructed: 6,858	Shares Voted: 6,858

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Sanjit Biswas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director John Bicket	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Marc Andreessen	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.4	Elect Director Todd Bluedorn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Sue Bostrom	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Jonathan Chadwick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Ann Livermore	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Sue Wagner	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Susan (Sue) Wagner for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.75 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. While cash incentives are entirely performance-based, concerns are raised regarding the CEO receiving a relatively large time-vesting equity grant.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed 06/21/2024	Auto-Approved 06/21/2024		6,858	6,858
Total Shares:						6,858	6,858

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Equitrans Midstream Corporation

Meeting Date: 07/18/2024	Country: USA	Ticker: ETRN	Proxy Level: 5
Record Date: 06/04/2024	Meeting Type: Special	Meeting ID: 1875505	
Primary Security ID: 294600200	Primary CUSIP: 294600200	Primary ISIN: US2946002001	Primary SEDOL: BMB6925
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,636	*Shares on Loan: 0	Shares Instructed: 1,636	Shares Voted: 1,636

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: On balance, a vote FOR this transaction is warranted in light of the compelling strategic rationale, the reasonably thorough sales process, and the premium implied by the equity form of consideration, which provides for continued participation in the upside potential of the combined company.</i>						
2	Advisory Vote on Golden Parachutes	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. While certain NEOs are eligible to receive single-trigger bonuses upon the transaction, cash severance and most equity awards are double trigger. Further, no excise tax gross-ups are payable.</i>						
3	Adjourn Meeting	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted given that the underlying transaction merits support.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 06/28/2024	Auto-Approved 06/28/2024	Shares Confirmed 06/29/2024	1,636	1,636
Total Shares:						1,636	1,636

ICON plc

Meeting Date: 07/23/2024	Country: Ireland	Ticker: ICLR	Proxy Level: N/A
Record Date: 06/03/2024	Meeting Type: Annual	Meeting ID: 1878368	
Primary Security ID: G4705A100	Primary CUSIP: G4705A100	Primary ISIN: IE0005711209	Primary SEDOL: B94G471
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 607	*Shares on Loan: 0	Shares Instructed: 607	Shares Voted: 607

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ciaran Murray	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Steve Cutler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Ronan Murphy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director John Climax	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Julie O'Neill	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Eugene McCague	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Linda Grais	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Accept Financial Statements and Statutory Reports	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR is warranted in the absence of any known issues concerning the company's audited accounts and financial statements.</i>						
3	Authorise Board to Fix Remuneration of Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because there are no significant concerns regarding this proposal.</i>						
4	Authorise Issue of Equity	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these resolutions is warranted as the proposed amounts and duration are within recommended limits.</i>						
5	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these resolutions is warranted as the proposed amounts and duration are within recommended limits.</i>						
6	Authorize Issue of Equity without Pre-emptive Rights in Connection with an Acquisition or Other Capital Investment	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these resolutions is warranted as the proposed amounts and duration are within recommended limits.</i>						
7	Authorise Market Purchase of Ordinary Shares	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted as the proposed amount and duration are within recommended limits.</i>						
8	Approve the Price Range for the Reissuance of Shares	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted because this is a routine item for companies incorporated in Ireland, and no significant concerns have been identified</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/09/2024	Auto-Approved 07/09/2024	Shares Confirmed 07/10/2024	607	607
Total Shares:						607	607

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Meeting Date: 07/23/2024	Country: USA	Ticker: VFC	Proxy Level: 3
Record Date: 05/28/2024	Meeting Type: Annual	Meeting ID: 1877230	
Primary Security ID: 918204108	Primary CUSIP: 918204108	Primary ISIN: US9182041080	Primary SEDOL: 2928683
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 2,014	*Shares on Loan: 0	Shares Instructed: 2,014	Shares Voted: 2,014

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard T. Carucci	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Alexander K. Cho	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Juliana L. Chugg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Bracken Darrell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Trevor A. Edwards	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Mindy F. Grossman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Mark S. Hoplamazian	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Laura W. Lang	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director W. Rodney McMullen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Clarence Otis, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Carol L. Roberts	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Matthew J. Shattock	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Kirk C. Tanner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>						

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VF Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i></p>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.84 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/05/2024	Auto-Approved 07/05/2024	Shares Confirmed 07/09/2024	2,014	2,014
Total Shares:						2,014	2,014

Booz Allen Hamilton Holding Corporation

Meeting Date: 07/24/2024	Country: USA	Ticker: BAH	Proxy Level: 3
Record Date: 06/03/2024	Meeting Type: Annual	Meeting ID: 1877925	
Primary Security ID: 099502106	Primary CUSIP: 099502106	Primary ISIN: US0995021062	Primary SEDOL: B5367T7
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 581	*Shares on Loan: 0	Shares Instructed: 581	Shares Voted: 581

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Horacio D. Rozanski	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Joan Lordi C. Amble	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1c	Elect Director Melody C. Barnes	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Michele A. Flournoy	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Mark E. Gaumont	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Ellen Jewett	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Booz Allen Hamilton Holding Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Arthur E. Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Gretchen W. McClain	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Rory P. Read	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Charles O. Rossotti	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director William M. Thornberry	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.42 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/05/2024	Auto-Approved 07/05/2024	Shares Confirmed 07/09/2024	581	581
Total Shares:						581	581

Cirrus Logic, Inc.

Meeting Date: 07/26/2024	Country: USA	Ticker: CRUS	Proxy Level: 3
Record Date: 05/28/2024	Meeting Type: Annual	Meeting ID: 1874345	Primary SEDOL: 2197308
Primary Security ID: 172755100	Primary CUSIP: 172755100	Primary ISIN: US1727551004	
Votable Shares: 100	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 100	Shares Voted: 100

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alexander M. Davern	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

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Cirrus Logic, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director John M. Forsyth	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Raghib Hussain	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Duy-Loan Le	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Catherine P. Lego	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director William D. Mosley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director David J. Tupman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.94 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - A majority of equity awards to the CEO are not tied to performance-contingent pay elements; and - Excessive differentials between CEO pay and the pay of other named executive officers at the firm.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
5	Amend Certificate of Incorporation to Permit the Exculpation of Officers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/08/2024	Auto-Approved 07/08/2024	Shares Confirmed 07/09/2024	100	100
Total Shares:						100	100

DXC Technology Company

Meeting Date: 07/30/2024	Country: USA	Ticker: DXC	Proxy Level: 3
Record Date: 05/31/2024	Meeting Type: Annual	Meeting ID: 1878163	
Primary Security ID: 23355L106	Primary CUSIP: 23355L106	Primary ISIN: US23355L1061	Primary SEDOL: BYXD7B3

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 592

*Shares on Loan: 0

Shares Instructed: 592

Shares Voted: 592

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David A. Barnes	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Raul J. Fernandez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Anthony Gonzalez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director David L. Herzog	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Pinkie D. Mayfield	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Karl Racine	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Dawn Rogers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Carrie W. Teffner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Akihiko Washington	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Robert F. Woods	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.95 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Amend Non-Employee Director Restricted Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although the estimated shareholder value transfer exceeds the Social Advisory Services Benchmark, the qualitative review of director compensation indicates that the company met most of the qualitative factors.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

DXC Technology Company

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/10/2024	Auto-Approved 07/10/2024	Shares Confirmed 07/11/2024	592	592
Total Shares:						592	592

GLOBALFOUNDRIES Inc.

Meeting Date: 07/30/2024 **Country:** Cayman Islands **Ticker:** GFS **Proxy Level:** N/A
Record Date: 06/05/2024 **Meeting Type:** Annual **Meeting ID:** 1879066
Primary Security ID: G39387108 **Primary CUSIP:** G39387108 **Primary ISIN:** KYG393871085 **Primary SEDOL:** BMW7F63

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 507 ***Shares on Loan:** 0 **Shares Instructed:** 507 **Shares Voted:** 507

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ahmed Yahia	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is non-independent and sits on a key committee.</i>							
1.2	Elect Director Elissa Murphy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Bobby Yerramilli-Rao	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/12/2024	Auto-Approved 07/12/2024	Shares Confirmed 07/18/2024	507	507
Total Shares:						507	507

Linde Plc

Meeting Date: 07/30/2024 **Country:** Ireland **Ticker:** LIN **Proxy Level:** N/A
Record Date: 04/26/2024 **Meeting Type:** Annual **Meeting ID:** 1860766
Primary Security ID: G54950103 **Primary CUSIP:** G54950103 **Primary ISIN:** IE000S9YS762 **Primary SEDOL:** BNZHB81

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 2

Voting Policy: UUA

Votable Shares: 1,647

*Shares on Loan: 0

Shares Instructed: 1,647

Shares Voted: 1,647

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stephen F. Angel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Sanjiv Lamba	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Ann-Kristin Achleitner	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1d	Elect Director Thomas Enders	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Hugh Grant	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Joe Kaeser	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST governance committee chair Josef (Joe) Kaeser is warranted as he is considered to be ultimately responsible for omitting the climate lobbying shareholder proposal without a reasonable rationale.</i>						
1g	Elect Director Victoria E. Ossadnik	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Paula Rosput Reynolds	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Alberto Weisser	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Robert L. Wood	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2a	Ratify PricewaterhouseCoopers as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
2b	Authorise Board to Fix Remuneration of Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because this is a routine item for companies incorporated in Ireland, and no significant concerns have been identified.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. In addition, annual incentives were primarily determined by pre-set financial metrics, and half of the long-term incentives were targeted to be performance conditioned with PSUs measured over a multi-year period.</i>						
4	Determine Price Range for Reissuance of Treasury Shares	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because this is a routine item for companies incorporated in Ireland, and no significant concerns have been identified.</i>						

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/05/2024	Auto-Approved 07/05/2024	Shares Confirmed 07/09/2024	1,605	1,605
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 07/05/2024	Auto-Approved 07/05/2024	Shares Confirmed 07/09/2024	42	42
Total Shares:						1,647	1,647

McKesson Corporation

Meeting Date: 07/31/2024	Country: USA	Ticker: MCK	Proxy Level: 3
Record Date: 06/05/2024	Meeting Type: Annual	Meeting ID: 1879371	
Primary Security ID: 58155Q103	Primary CUSIP: 58155Q103	Primary ISIN: US58155Q1031	Primary SEDOL: 2378534
Votable Shares: 384	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 384	Shares Voted: 384

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard H. Carmona	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Dominic J. Caruso	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director W. Roy Dunbar	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Deborah Dunsire	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director James H. Hinton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Donald R. Knauss	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Bradley E. Lerman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Maria N. Martinez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Kevin M. Ozan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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McKesson Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Brian S. Tyler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Kathleen Wilson-Thompson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. The STI plan is primarily based on quantified pre-set goals, and a majority of equity awards are performance-based and measured over a multi-year performance period.</i>							
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>							
5	Require Independent Board Chair	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chair of the board.</i>							
6	Report on Potential Risks and Costs of Restrictive Reproductive Healthcare Legislation	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this resolution is warranted, as additional information on the potential risks and costs associated with proposed or enacted policies that restrict reproductive healthcare, would allow shareholders to assess how the company is managing such risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/12/2024	Auto-Approved 07/12/2024	Shares Confirmed 07/13/2024	384	384
Total Shares:						384	384

Electronic Arts Inc.

Meeting Date: 08/01/2024	Country: USA	Ticker: EA	Proxy Level: 3
Record Date: 06/06/2024	Meeting Type: Annual	Meeting ID: 1878154	
Primary Security ID: 285512109	Primary CUSIP: 285512109	Primary ISIN: US2855121099	Primary SEDOL: 2310194

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 1,391

*Shares on Loan: 0

Shares Instructed: 1,391

Shares Voted: 1,391

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kofi A. Bruce	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Rachel A. Gonzalez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Jeffrey T. Huber	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1d	Elect Director Talbott Roche	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Richard A. Simonson	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1f	Elect Director Luis A. Ubinas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Heidi J. Ueberroth	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Andrew Wilson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 07/01/2024	Auto-Approved 07/02/2024	Shares Confirmed 07/10/2024	1,391	1,391
Total Shares:						1,391	1,391

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Ralph Lauren Corporation

Meeting Date: 08/01/2024	Country: USA	Ticker: RL	Proxy Level: 3
Record Date: 06/04/2024	Meeting Type: Annual	Meeting ID: 1879121	
Primary Security ID: 751212101	Primary CUSIP: 751212101	Primary ISIN: US7512121010	Primary SEDOL: B4V9661
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 424	*Shares on Loan: 0	Shares Instructed: 424	Shares Voted: 424

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Linda Findley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Hubert Joly	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Darren Walker	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for governance committee member Darren Walker for maintaining a multiclass structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.52 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Annual incentives are predominantly tied to pre-set financial metrics and long-term incentive awards are half-performance based. However, executive chairman Ralph Lauren's high pay remains a concern.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	424	424
			07/03/2024	07/03/2024	07/09/2024		
Total Shares:						424	424

John Bean Technologies Corporation

Meeting Date: 08/08/2024	Country: USA	Ticker: JBT	Proxy Level: 5
Record Date: 06/18/2024	Meeting Type: Special	Meeting ID: 1879900	
Primary Security ID: 477839104	Primary CUSIP: 477839104	Primary ISIN: US4778391049	Primary SEDOL: B3BRJZ8
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,536	*Shares on Loan: 0	Shares Instructed: 1,536	Shares Voted: 1,536

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Issue Shares in Connection with Meger	Mgmt	Yes	For	For	For	For

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John Bean Technologies Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<p><i>Voting Policy Rationale: A vote FOR this transaction is warranted. While shares have declined since the definitive merger announcement, share prices remain directionally aligned with the broader index, and there has been no publicly disclosed shareholder opposition. Moreover, the strategic rationale for the transaction appears reasonable, expanding JBT's operations while providing cost savings, and the combination is expected to be earnings accretive.</i></p>						
2	Adjourn Meeting	Mgmt	Yes	For	For	For	For
	<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as the underlying merger merits support.</i></p>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 07/30/2024	Auto-Approved 07/30/2024	Shares Confirmed 07/31/2024	1,536	1,536
Total Shares:						1,536	1,536

Immunovant, Inc.

Meeting Date: 08/12/2024	Country: USA	Ticker: IMVT	Proxy Level: 3
Record Date: 06/18/2024	Meeting Type: Annual	Meeting ID: 1879979	
Primary Security ID: 45258J102	Primary CUSIP: 45258J102	Primary ISIN: US45258J1025	Primary SEDOL: BJRFSB7
Total Ballots: 1	Voting Policy: UUA		
Votable Shares: 1,332	*Shares on Loan: 0	Shares Instructed: 1,332	Shares Voted: 1,332

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peter Salzmann	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<p><i>Voting Policy Rationale: The board is not majority independent. The board does not include at least one woman director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for non-independent director nominee Peter (Pete) Salzmann for failing to establish a board on which a majority of the directors are independent. WITHHOLD votes are warranted for incumbent director nominees Peter (Pete) Salzmann, Douglas (Doug) Hughes, and George Migauskys for failing to establish gender diversity on the board and given that the company maintains a multi-class capital structure with disparate voting rights that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are further warranted for Compensation Committee member Douglas (Doug) Hughes due to consecutive years of high pay to the non-employee chairman without a reasonable rationale disclosed.</i></p>						
1.2	Elect Director George Migauskys	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<p><i>Voting Policy Rationale: The board is not majority independent. The board does not include at least one woman director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for non-independent director nominee Peter (Pete) Salzmann for failing to establish a board on which a majority of the directors are independent. WITHHOLD votes are warranted for incumbent director nominees Peter (Pete) Salzmann, Douglas (Doug) Hughes, and George Migauskys for failing to establish gender diversity on the board and given that the company maintains a multi-class capital structure with disparate voting rights that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are further warranted for Compensation Committee member Douglas (Doug) Hughes due to consecutive years of high pay to the non-employee chairman without a reasonable rationale disclosed.</i></p>						
1.3	Elect Director Douglas Hughes	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<p><i>Voting Policy Rationale: The board is not majority independent. The board does not include at least one woman director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for non-independent director nominee Peter (Pete) Salzmann for failing to establish a board on which a majority of the directors are independent. WITHHOLD votes are warranted for incumbent director nominees Peter (Pete) Salzmann, Douglas (Doug) Hughes, and George Migauskys for failing to establish gender diversity on the board and given that the company maintains a multi-class capital structure with disparate voting rights that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are further warranted for Compensation Committee member Douglas (Doug) Hughes due to consecutive years of high pay to the non-employee chairman without a reasonable rationale disclosed.</i></p>						

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Immunovant, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not disclosed any risk mitigators, such as a clawback policy, CEO stock ownership guidelines, or stock holding period requirements.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 07/25/2024	Auto-Approved 07/25/2024	Shares Confirmed 07/26/2024	1,332	1,332
Total Shares:						1,332	1,332

Nu Holdings Ltd.

Meeting Date: 08/13/2024	Country: Cayman Islands	Ticker: NU	Proxy Level: N/A
Record Date: 07/05/2024	Meeting Type: Annual	Meeting ID: 1883126	
Primary Security ID: G6683N103	Primary CUSIP: G6683N103	Primary ISIN: KYG6683N1034	Primary SEDOL: BN6NP19
Votable Shares: 56,021	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 56,021	Shares Voted: 56,021

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports (Voting)	Mgmt	Yes	For	For	For	For
2a	Elect Director David Velez Osorno	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST non-independent director nominee David Velez Osorno is warranted due to the company's lack of a formal nominating committee.</i>							
2b	Elect Director Anita Mary Sands	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2c	Elect Director Daniel Krepel Goldberg	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2d	Elect Director David Alexandre Marcus	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2e	Elect Director Douglas Mauro Leone	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Nu Holdings Ltd.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2f	Elect Director Jacqueline Dawn Reses	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2g	Elect Director Luis Alberto Moreno Mejia	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2h	Elect Director Rogerio Paulo Calderon Peres	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2i	Elect Director Thuan Quang Pham	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	56,021	56,021
			07/29/2024	07/29/2024	07/30/2024		
Total Shares:						56,021	56,021

Alibaba Group Holding Limited

Meeting Date: 08/22/2024	Country: Cayman Islands	Ticker: 9988	Proxy Level: N/A
Record Date: 07/02/2024	Meeting Type: Annual	Meeting ID: 1881967	
Primary Security ID: G01719114	Primary CUSIP: G01719114	Primary ISIN: KYG017191142	Primary SEDOL: BK6YZP5
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 29	*Shares on Loan: 0	Shares Instructed: 29	Shares Voted: 29

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	Meeting for ADR Holders	Mgmt	No				
1	Amend Memorandum and Articles of Association	Mgmt	Yes	For	For	For	For
2	Approve Issuance of Equity or Equity-Linked Securities without Preemptive Rights	Mgmt	Yes	For	For	For	For
3	Authorize Share Repurchase Program	Mgmt	Yes	For	For	For	For
4.1	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR these resolutions is warranted given that the terms of the proposed plan are reasonable.</i>							
4.2	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR these resolutions is warranted given that the terms of the proposed plan are reasonable.</i>							
5.1	Elect Director Joseph C. Tsai	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is at least 30 percent diversity.</i>							

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Alibaba Group Holding Limited

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
5.2	Elect Director J. Michael Evans	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is at least 30 percent diversity.</i>						
5.3	Elect Director Weijian Shan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is at least 30 percent diversity.</i>						
5.4	Elect Director Irene Yun-Lien Lee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is at least 30 percent diversity.</i>						
6	Ratify PricewaterhouseCoopers Zhong Tian LLP and PricewaterhouseCoopers as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.00 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 08/02/2024	Auto-Approved 08/02/2024	Shares Confirmed 08/03/2024	29	29
Total Shares:						29	29

Boot Barn Holdings, Inc.

Meeting Date: 08/28/2024	Country: USA	Ticker: BOOT	Proxy Level: 3
Record Date: 07/01/2024	Meeting Type: Annual	Meeting ID: 1884000	
Primary Security ID: 099406100	Primary CUSIP: 099406100	Primary ISIN: US0994061002	Primary SEDOL: BRS6600
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,005	*Shares on Loan: 0	Shares Instructed: 1,005	Shares Voted: 1,005

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peter Starrett	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Chris Bruzzo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Eddie Burt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director James G. Conroy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Lisa G. Laube	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Boot Barn Holdings, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director Anne MacDonald	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Brenda I. Morris	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Brad Weston	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 22.45 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 07/30/2024	Auto-Approved 07/30/2024	Shares Confirmed 08/08/2024	1,005	1,005
Total Shares:						1,005	1,005

Casey's General Stores, Inc.

Meeting Date: 08/28/2024	Country: USA	Ticker: CASY	Proxy Level: 3
Record Date: 06/26/2024	Meeting Type: Annual	Meeting ID: 1883887	
Primary Security ID: 147528103	Primary CUSIP: 147528103	Primary ISIN: US1475281036	Primary SEDOL: 2179414
Votable Shares: 455	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 455	Shares Voted: 455

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sri Donthi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Donald E. Frieson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Cara K. Heiden	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director David K. Lenhardt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Casey's General Stores, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Maria Castanon Moats	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Darren M. Rebelez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Larree M. Renda	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Judy A. Schmeling	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Michael Spanos	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Gregory A. Trojan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Allison M. Wing	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.50 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Require Independent Board Chair	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chairman of the board.</i>							
5	Report on Efforts to Reduce GHG Emissions in Alignment with Paris Agreement Goal	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional information on the company's efforts to reduce its carbon footprint would allow investors to better understand how the company is managing its transition to a low carbon economy and reducing climate change-related risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 08/14/2024	Auto-Approved 08/14/2024	Shares Confirmed 08/15/2024	455	455
Total Shares:						455	455

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Meeting Date: 09/10/2024	Country: USA	Ticker: GEN	Proxy Level: 3
Record Date: 07/15/2024	Meeting Type: Annual	Meeting ID: 1885919	
Primary Security ID: 668771108	Primary CUSIP: 668771108	Primary ISIN: US6687711084	Primary SEDOL: BJN4XN5
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,213	*Shares on Loan: 0	Shares Instructed: 1,213	Shares Voted: 1,213

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan P. Barsamian	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Pavel Baudis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Eric K. Brandt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Frank E. Dangeard	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Nora M. Denzel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Peter A. Feld	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Emily Heath	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Vincent Pilette	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Sherrese M. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Ondrej Vlcek	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Though concerns exist regarding the lack of disclosure of specific targets and results in the annual incentive program, equity awards were majority performance-conditioned and based on metrics with forward-looking targets measured over multi-year performance periods.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 08/20/2024	Auto-Approved 08/20/2024	Shares Confirmed 08/21/2024	1,213	1,213
Total Shares:						1,213	1,213

NIKE, Inc.

Meeting Date: 09/10/2024	Country: USA	Ticker: NKE	Proxy Level: 5
Record Date: 07/10/2024	Meeting Type: Annual	Meeting ID: 1885339	
Primary Security ID: 654106103	Primary CUSIP: 654106103	Primary ISIN: US6541061031	Primary SEDOL: 2640147
Votable Shares: 100	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 100
	*Shares on Loan: 0	Shares Instructed: 100	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cathleen Benko	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director John Rogers, Jr.	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes from governance committee member John Rogers Jr. in light of the multi-class capital structure with disparate voting rights that is not subject to a reasonable time-based sunset. A vote FOR the remaining director nominees is warranted.</i>							
1c	Elect Director Robert Swan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as a majority of equity awards to the CEO are not tied to performance-contingent pay elements. In addition, the pay to the CEO is high relative to company performance and compared to the company's peers.</i>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.76 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Report on Median Gender/Racial Pay Gaps	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as median pay gap statistics across race and gender would allow shareholders to compare and measure the progress of the company's diversity and inclusion initiatives.</i>							
5	Report on Effectiveness of Supply Chain Management on Equity Goals and Human Rights Commitments	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional information regarding the processes the company uses to assess human rights impacts in its operations and supply chain would allow shareholders to better gauge how well the company is managing human rights related risks.</i>							

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NIKE, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
6	Report on the Impact of Work-Driven Responsibility Principles and Supporting Binding Agreements in Sourcing from High-Risk Countries	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: see screen note</i>							
7	Report on Environmental Targets	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the company missed and restated many of its FY20 targets without adequate discussion of how the company's management and oversight of its sustainability targets would change in the future to avoid such a situation.</i>							
8	Report on Congruency of Voluntary Partnerships with Company's Fiduciary Duties	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as the company provides sufficient disclosure on the business-relevant aims of its various partnerships.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 08/27/2024	Auto-Approved 08/27/2024	Shares Confirmed 08/28/2024	100	100
Total Shares:						100	100

NetApp, Inc.

Meeting Date: 09/11/2024	Country: USA	Ticker: NTAP	Proxy Level: 3
Record Date: 07/16/2024	Meeting Type: Annual	Meeting ID: 1885682	
Primary Security ID: 64110D104	Primary CUSIP: 64110D104	Primary ISIN: US64110D1046	Primary SEDOL: 2630643
Votable Shares: 371	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 371	Shares Voted: 371

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director T. Michael Nevens	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Deepak Ahuja	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Anders Gustafsson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Gerald Held	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Deborah L. Kerr	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director George Kurian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Carrie Palin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Scott F. Schenkel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director June Yang	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Though the rigor and disclosure of performance equity could be improved, equity awards are predominantly performance-conditioned and half use a multi-year performance period. Additionally, annual incentives are largely based on pre-set objective metrics.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 19.54 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive - The three-year average burn rate is excessive - The plan permits liberal recycling of shares - The plan allows broad discretion to accelerate vesting</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 08/13/2024	Auto-Approved 08/13/2024	Shares Confirmed 08/14/2024	371	371
Total Shares:						371	371

Take-Two Interactive Software, Inc.

Meeting Date: 09/18/2024	Country: USA	Ticker: TTWO	Proxy Level: 3
Record Date: 07/23/2024	Meeting Type: Annual	Meeting ID: 1885342	
Primary Security ID: 874054109	Primary CUSIP: 874054109	Primary ISIN: US8740541094	Primary SEDOL: 2122117
Votable Shares: 483	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 483	Shares Voted: 483

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Strauss Zelnick	Mgmt	Yes	For	For	For	For

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Take-Two Interactive Software, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Michael Dornemann	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director J Moses	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Michael Sheresky	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director LaVerne Srinivasan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Susan Tolson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Paul Viera	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Roland Hernandez	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director William "Bing" Gordon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Ellen Siminoff	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Compensation for the CEO is primarily paid by the external manager under a management services agreement. Although this arrangement can result in limited pay disclosure, in this case the company provides sufficient disclosure of the pay programs. While certain pay magnitude concerns are highlighted, a rigorous STI program, predominantly performance-based LTI program, and pay outcomes mitigate these concerns for the year in review.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 15.91 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 08/27/2024	Auto-Approved 08/27/2024	Shares Confirmed 08/28/2024	483	483
Total Shares:						483	483

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Meeting Date: 09/23/2024	Country: USA	Ticker: FDX	Proxy Level: 3
Record Date: 07/29/2024	Meeting Type: Annual	Meeting ID: 1888808	
Primary Security ID: 31428X106	Primary CUSIP: 31428X106	Primary ISIN: US31428X1063	Primary SEDOL: 2142784
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 344	*Shares on Loan: 0	Shares Instructed: 344	Shares Voted: 344

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Silvia Davila	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Marvin R. Ellison	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Stephen E. Gorman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Susan Patricia Griffith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Amy B. Lane	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director R. Brad Martin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Nancy A. Norton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Frederick P. Perpall	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Joshua Cooper Ramo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Susan C. Schwab	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1k	Elect Director Frederick W. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director David P. Steiner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Rajesh Subramaniam	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1n	Elect Director Paul S. Walsh	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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FedEx Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company maintains an auto-accelerated equity vesting change-in-control provision.</i></p>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.11 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. The company seeks to align its officer exculpation provisions with the recently amended Delaware statute and existing protections afforded to directors, providing protections to officers that would allow the company to attract and retain quality personnel without negatively impacting shareholder rights.</i></p>							
5	Amend Certificate of Incorporation to Remove Pass-Through Voting Provision	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as it does not appear to adversely impact shareholder rights.</i></p>							
6	Report on "Just Transition"	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as greater disclosure around the company's just transition strategy specifically would better position shareholders to evaluate any related risks and opportunities.</i></p>							
7	Require Shareholder Approval of Bylaw Amendments Adopted by the Board of Directors	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as requiring shareholder ratification of any governing document amendment adopted by the board, even those for administrative purposes, would be overly burdensome. In addition, shareholders have effective recourse to modify any bylaws and articles adopted by the board, if necessary.</i></p>							
8	Report on Framework to Assess Company Lobbying Alignment with Climate Goals	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted at this time as shareholders may benefit from a more complete evaluation of climate lobbying being conducted on the company's behalf.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 09/09/2024	Auto-Approved 09/09/2024	Shares Confirmed 09/10/2024	344	344
Total Shares:						344	344

General Mills, Inc.

Meeting Date: 09/24/2024	Country: USA	Ticker: GIS	Proxy Level: 3
Record Date: 07/26/2024	Meeting Type: Annual	Meeting ID: 1888796	
Primary Security ID: 370334104	Primary CUSIP: 370334104	Primary ISIN: US3703341046	Primary SEDOL: 2367026

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 4,335

*Shares on Loan: 0

Shares Instructed: 4,335

Shares Voted: 4,335

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Benno O. Dorer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director C. Kim Goodwin	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1c	Elect Director Jeffrey L. Harmening	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Maria G. Henry	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Jo Ann Jenkins	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Elizabeth C. Lempres	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director John G. Morikis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Diane L. Neal	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Steve Odland	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Maria A. Sastre	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Eric D. Sprunk	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Jorge A. Uribe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. STI are primarily based on pre-set financial metrics while half of the LTI are performance-based and measured over a multi-year performance period.</i>						
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.22 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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General Mills, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Disclose Regenerative Agriculture Practices Within Supply Chain	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as increased disclosure about the company's reduction of synthetic pesticide use would allow investors to better understand how the company is managing related risks.</i>							
5	Report on Efforts to Reduce Plastic Use	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as shareholders would benefit from additional information on how the company is managing risks related to its use of plastic packaging.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 09/11/2024	Auto-Approved 09/11/2024	Shares Confirmed 09/12/2024	4,335	4,335
Total Shares:						4,335	4,335

Trimble Inc.

Meeting Date: 09/30/2024	Country: USA	Ticker: TRMB	Proxy Level: 3
Record Date: 04/01/2024	Meeting Type: Annual	Meeting ID: 1851206	
Primary Security ID: 896239100	Primary CUSIP: 896239100	Primary ISIN: US8962391004	Primary SEDOL: 2903958
Votable Shares: 911	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 911	Shares Voted: 911

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director James C. Dalton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Borje Ekholm	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Kaigham (Ken) Gabriel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Meaghan Lloyd	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Ronald S. Nersesian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Robert G. Painter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Mark S. Peek	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Trimble Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Kara Sprague	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Thomas Sweet	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Johan Wibergh	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Some concern is raised by the relative TSR metric used for PRSUs, which targets median performance. However, STI awards were primarily based on pre-set financial goals, and LTI awards are at least half performance-based and utilize multi-year goals.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.32 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 05/14/2024	Auto-Approved 05/14/2024	Shares Confirmed 05/15/2024	911	911
Total Shares:						911	911

Freshpet, Inc.

Meeting Date: 10/01/2024	Country: USA	Ticker: FRPT	Proxy Level: 3
Record Date: 08/15/2024	Meeting Type: Annual	Meeting ID: 1891028	
Primary Security ID: 358039105	Primary CUSIP: 358039105	Primary ISIN: US3580391056	Primary SEDOL: BS7K7M9
Votable Shares: 1,039	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,039	Shares Voted: 1,039

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director David B. Biegger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1B	Elect Director Daryl G. Brewster	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1C	Elect Director Jacki S. Kelley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Freshpet, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1D	Elect Director Timothy R. McLevish	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 09/09/2024	Auto-Approved 09/09/2024	Shares Confirmed 09/10/2024	1,039	1,039
Total Shares:						1,039	1,039

Paychex, Inc.

Meeting Date: 10/10/2024	Country: USA	Ticker: PAYX	Proxy Level: 3
Record Date: 08/12/2024	Meeting Type: Annual	Meeting ID: 1893698	
Primary Security ID: 704326107	Primary CUSIP: 704326107	Primary ISIN: US7043261079	Primary SEDOL: 2674458
Votable Shares: 361	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 361	Shares Voted: 361

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Martin Mucci	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Thomas F. Bonadio	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Joseph G. Doody	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director John B. Gibson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director B. Thomas Golisano	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Paychex, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Pamela A. Joseph	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1g	Elect Director Theresa M. Payton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Kevin A. Price	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Joseph M. Tucci	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Joseph M. Velli	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1k	Elect Director Kara Wilson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. While some concerns are noted in the LTI plan, annual incentives are largely based on pre-set objective measures and half of the equity awards were performance-based.</i>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.66 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 09/11/2024	Auto-Approved 09/11/2024	Shares Confirmed 09/18/2024	361	361
Total Shares:						361	361

CACI International Inc

Meeting Date: 10/17/2024	Country: USA	Ticker: CACI	Proxy Level: 3
Record Date: 08/23/2024	Meeting Type: Annual	Meeting ID: 1897127	
Primary Security ID: 127190304	Primary CUSIP: 127190304	Primary ISIN: US1271903049	Primary SEDOL: 2159267
Votable Shares: 121	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 121	Shares Voted: 121

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael A. Daniels	Mgmt	Yes	For	For	For	For

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Lisa S. Disbrow	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1c	Elect Director Susan M. Gordon	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1d	Elect Director William L. Jews	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1e	Elect Director Ryan D. McCarthy	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1f	Elect Director John S. Mengucci	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Scott C. Morrison	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Philip O. Nolan	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1i	Elect Director Debora A. Plunkett	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Stanton D. Sloane	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Charles L. Szews	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 26.91 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/07/2024	Auto-Approved 10/07/2024	Shares Confirmed 10/08/2024	121	121

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Medtronic Plc

Meeting Date: 10/17/2024 **Country:** Ireland **Ticker:** MDT **Proxy Level:** N/A
Record Date: 08/23/2024 **Meeting Type:** Annual **Meeting ID:** 1888486
Primary Security ID: G5960L103 **Primary CUSIP:** G5960L103 **Primary ISIN:** IE00BTN1Y115 **Primary SEDOL:** BTN1Y11

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 1,164 ***Shares on Loan:** 0 **Shares Instructed:** 1,164 **Shares Voted:** 1,164

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Craig Arnold	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Scott C. Donnelly	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Lidia L. Fonseca	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Andrea J. Goldsmith	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1e	Elect Director Randall J. Hogan, III	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Gregory P. Lewis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Kevin E. Lofton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Geoffrey S. Martha	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Elizabeth G. Nabel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Kendall J. Powell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors and Authorize Board to fix Their Remuneration	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.10 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Medtronic Plc

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted although a concern is noted regarding the lack of disclosure in the LTI program. Nevertheless, performance shares vest on achievement of financial metrics and are measured over a multi-year performance period, while annual incentives are largely based on pre-set financial metrics.</i>							
4	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR these resolutions is warranted because the proposed amount and durations are within recommended limits.</i>							
5	Renew the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR these resolutions is warranted because the proposed amount and durations are within recommended limits.</i>							
6	Authorize Overseas Market Purchases of Ordinary Shares	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the amount and duration are within recommended limits.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 09/17/2024	Auto-Approved 09/17/2024	Shares Confirmed 09/27/2024	1,164	1,164
Total Shares:						1,164	1,164

Applied Industrial Technologies, Inc.

Meeting Date: 10/22/2024	Country: USA	Ticker: AIT	Proxy Level: 3
Record Date: 09/27/2024	Meeting Type: Annual	Meeting ID: 1898967	
Primary Security ID: 03820C105	Primary CUSIP: 03820C105	Primary ISIN: US03820C1053	Primary SEDOL: 2086309
Votable Shares: 874	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 874	Shares Voted: 874

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Madhuri A. Andrews	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Shelly M. Chadwick	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Vincent K. Petrella	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Applied Industrial Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.36 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 10/03/2024	Auto-Approved 10/03/2024		874	874
Total Shares:						874	874

Mercury Systems, Inc.

Meeting Date: 10/23/2024	Country: USA	Ticker: MRCY	Proxy Level: 3
Record Date: 08/26/2024	Meeting Type: Annual	Meeting ID: 1898151	
Primary Security ID: 589378108	Primary CUSIP: 589378108	Primary ISIN: US5893781089	Primary SEDOL: 2144047
Votable Shares: 3,506	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 3,506	Shares Voted: 3,506

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Orlando P. Carvalho	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.2	Elect Director Barry R. Nearhos	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.3	Elect Director Debora A. Plunkett	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as the pay-for-performance misalignment has not been mitigated. Annual incentives were entirely based on pre-set financial metrics and LTI awards were majority performance-based and utilize a multi-year performance period. However, CEO Ballhaus' total pay was significantly elevated, primarily due to an oversized new-hire option award, and the proxy does not disclose a compelling rationale. Further, the committee approved discretionary bonuses for NEOs despite below threshold performance regarding the STIP and the proxy does not disclose forward-looking goals and closing-cycle award results in the LTIP.</i>							
3	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the purchase price and the number of shares reserved are reasonable, and the offering period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							

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Mercury Systems, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 10/04/2024	Auto-Approved 10/04/2024	Shares Confirmed 10/09/2024	3,506	3,506
Total Shares:						3,506	3,506

Paycor HCM, Inc.

Meeting Date: 10/23/2024 **Country:** USA **Ticker:** PYCR **Proxy Level:** 3
Record Date: 09/16/2024 **Meeting Type:** Annual **Meeting ID:** 1900788
Primary Security ID: 70435P102 **Primary CUSIP:** 70435P102 **Primary ISIN:** US70435P1021 **Primary SEDOL:** BNLJ59

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 1,040 ***Shares on Loan:** 0 **Shares Instructed:** 1,040 **Shares Voted:** 1,040

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Raul Villar, Jr.	Mgmt	Yes	For	Withhold	Withhold	Withhold

Voting Policy Rationale: WITHHOLD votes are warranted for incumbent director nominee Raul Villar Jr. given the board's failure to remove, or subject to a sunset requirement, the classified board and the pop-up supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominee, Drury (Dru) Armstrong, is warranted.

1.2	Elect Director Drury ("Dru") Armstrong	Mgmt	Yes	For	For	For	For
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Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.

2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
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Voting Policy Rationale: A vote AGAINST this proposal is warranted. A quantitative pay-for-performance misalignment exists for the year under consideration and sufficient mitigating factors have not been identified. Annual incentives were based on pre-set financial targets, but equity awards were entirely time-based. The introduction of PSUs for next year is considered a positive development, but concerns exist regarding the use of a metric and performance period that overlaps with the annual incentive program.

3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
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Voting Policy Rationale: A vote FOR this item is warranted because only 3.47 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/08/2024	Auto-Approved 10/08/2024	Shares Confirmed 10/10/2024	1,040	1,040
Total Shares:						1,040	1,040

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Concentrix Corporation

Meeting Date: 10/28/2024	Country: USA	Ticker: CNXC	Proxy Level: 3
Record Date: 08/30/2024	Meeting Type: Special	Meeting ID: 1899097	
Primary Security ID: 20602D101	Primary CUSIP: 20602D101	Primary ISIN: US20602D1019	Primary SEDOL: BNKVY4
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 423	*Shares on Loan: 0	Shares Instructed: 423	Shares Voted: 423

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i>							
2	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive; - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i>							
3	Adjourn Meeting	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as an underlying item (Item 2) does not merit support.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/02/2024	Auto-Approved 10/02/2024	Shares Confirmed 10/03/2024	423	423
Total Shares:						423	423

Lam Research Corporation

Meeting Date: 11/05/2024	Country: USA	Ticker: LRCX	Proxy Level: 3
Record Date: 09/06/2024	Meeting Type: Annual	Meeting ID: 1900446	
Primary Security ID: 512807306	Primary CUSIP: 512807306	Primary ISIN: US5128073062	Primary SEDOL: BSML4N7
	Total Ballots: 2	Voting Policy: UUA	
Votable Shares: 325	*Shares on Loan: 0	Shares Instructed: 325	Shares Voted: 325

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sohail U. Ahmed	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Timothy M. Archer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Eric K. Brandt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Lam Research Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Ita M. Brennan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Michael R. Cannon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director John M. Dineen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Mark Fields	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Ho Kyu Kang	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Bethany J. Mayer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Jyoti K. Mehra	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Abhijit Y. Talwalkar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned. In addition, annual and long-term incentive awards are majority performance based, and long-term awards utilize a multi-year performance period.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.36 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/07/2024	Auto-Approved 10/07/2024	Shares Confirmed 10/16/2024	14	14
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed 10/07/2024	Auto-Approved 10/07/2024	Shares Confirmed 10/16/2024	311	311
Total Shares:						325	325

Ancor Plc

Meeting Date: 11/06/2024

Country: Jersey

Ticker: AMCR

Proxy Level: N/A

Record Date: 09/11/2024

Meeting Type: Annual

Meeting ID: 1900252

Primary Security ID: G0250X107

Primary CUSIP: G0250X107

Primary ISIN: JE00BJ1F3079

Primary SEDOL: BJ1F307

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 4,817

***Shares on Loan:** 0

Shares Instructed: 4,817

Shares Voted: 4,817

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Graeme Liebelt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Peter Konieczny	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Achal Agarwal	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Andrea Bertone	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Susan Carter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Graham Chipchase	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Lucrece Foufopoulos-De Ridder	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Nicholas T. Long (Tom)	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Arun Nayar	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1j	Elect Director David Szczupak	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers AG as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.99 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned, and no significant concerns were identified at this time. Annual incentives and long-term incentives are predominantly based on objective financial metrics.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/08/2024	Auto-Approved 10/08/2024	Shares Confirmed 10/10/2024	4,817	4,817
Total Shares:						4,817	4,817

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Automatic Data Processing, Inc.

Meeting Date: 11/06/2024	Country: USA	Ticker: ADP	Proxy Level: 3
Record Date: 09/09/2024	Meeting Type: Annual	Meeting ID: 1899483	
Primary Security ID: 053015103	Primary CUSIP: 053015103	Primary ISIN: US0530151036	Primary SEDOL: 2065308

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 641	*Shares on Loan: 0
	Shares Instructed: 641
	Shares Voted: 641

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter Bisson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Maria Black	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director David V. Goeckeler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Linnie M. Haynesworth	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director John P. Jones	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Francine S. Katsoudas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Nazzic S. Keene	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Thomas J. Lynch	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Scott F. Powers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director William J. Ready	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1k	Elect Director Carlos A. Rodriguez	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Sandra S. Wijnberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Some concerns are noted regarding the goal rigor for the STI and LTI programs. However, the STI is primarily based on preset financial goals, while the LTI is largely performance-based.</i>						

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Automatic Data Processing, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
Ballot Details							
Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/07/2024	Auto-Approved 10/07/2024	Shares Confirmed 10/15/2024	641	641
Total Shares:						641	641

Cardinal Health, Inc.

Meeting Date: 11/06/2024	Country: USA	Ticker: CAH	Proxy Level: 4
Record Date: 09/09/2024	Meeting Type: Annual	Meeting ID: 1898968	
Primary Security ID: 14149Y108	Primary CUSIP: 14149Y108	Primary ISIN: US14149Y1082	Primary SEDOL: 2175672
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 778	*Shares on Loan: 0	Shares Instructed: 778	Shares Voted: 778

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert W. Azelby	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Michelle M. Brennan	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Sheri H. Edison	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director David C. Evans	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Patricia A. Hemingway Hall	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Jason M. Hollar	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1g	Elect Director Akhil Johri	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1h	Elect Director Gregory B. Kenny	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1i	Elect Director Nancy Killefer	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Cardinal Health, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Christine A. Mundkur	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.96 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Adopt Policy on Improved Majority Voting for Election of Directors	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as there are no recurring issues or company-specific factors at the company that suggest the proponent's more stringent director resignation policy is necessary at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/22/2024	Auto-Approved 10/22/2024	Shares Confirmed 10/23/2024	778	778
Total Shares:						778	778

KLA Corporation

Meeting Date: 11/06/2024	Country: USA	Ticker: KLAC	Proxy Level: 3
Record Date: 09/12/2024	Meeting Type: Annual	Meeting ID: 1899591	
Primary Security ID: 482480100	Primary CUSIP: 482480100	Primary ISIN: US4824801009	Primary SEDOL: 2480138
Votable Shares: 75	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 75	Shares Voted: 75

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert Calderoni	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Jeneanne Hanley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Emiko Higashi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Kevin Kennedy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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KLA Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Michael McMullen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Gary Moore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Victor Peng	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Robert Rango	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Richard P. Wallace	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.45 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. In addition, annual incentives were based on a pre-set financial metric, and a majority of long-term incentives were performance conditioned and measured over multi-year periods.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/16/2024	Auto-Approved 10/16/2024	Shares Confirmed 11/06/2024	75	75
Total Shares:						75	75

Texas Pacific Land Corporation

Meeting Date: 11/08/2024	Country: USA	Ticker: TPL	Proxy Level: 4
Record Date: 09/13/2024	Meeting Type: Annual	Meeting ID: 1900123	
Primary Security ID: 88262P102	Primary CUSIP: 88262P102	Primary ISIN: US88262P1021	Primary SEDOL: BM99VY2
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 458	*Shares on Loan: 0	Shares Instructed: 458	Shares Voted: 458

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Barbara J. Duganier	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Texas Pacific Land Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Tyler Glover	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Karl F. Kurz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Robert Roosa	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Murray Stahl	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1f	Elect Director Marguerite Woung-Chapman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Currently, the company does not provide shareholders with the ability to call special meetings. As such, a vote FOR this proposal is warranted as it represents an enhancement to shareholder rights.</i>						
5	Amend Clawback Policy	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the company's current clawback policy does not provide for the disclosure of the amounts and circumstances surrounding any recoupments. Such disclosure would benefit shareholders.</i>						
6	Provide Right to Act by Written Consent	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the ability to act by written consent would enhance shareholder rights.</i>						
7	Require a Majority Vote for the Election of Directors	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The scope of the proposal is unduly restrictive in that it does not provide the board an opportunity to address the underlying issue causing shareholders' dissatisfaction in lieu of the director's de-nomination at next annual meeting. Furthermore, the board has already adopted a majority vote standard in uncontested director elections that reflects best market practice.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/28/2024	Auto-Approved 10/28/2024	Shares Confirmed 10/29/2024	458	458
Total Shares:						458	458

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Jack Henry & Associates, Inc.

Meeting Date: 11/12/2024	Country: USA	Ticker: JKHY	Proxy Level: 3
Record Date: 09/16/2024	Meeting Type: Annual	Meeting ID: 1902256	
Primary Security ID: 426281101	Primary CUSIP: 426281101	Primary ISIN: US4262811015	Primary SEDOL: 2469193

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 392	*Shares on Loan: 0
	Shares Instructed: 392
	Shares Voted: 392

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director David B. Foss	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Matthew C. Flanigan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Thomas H. Wilson, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Thomas A. Wimsett	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Shruti S. Miyashiro	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Wesley A. Brown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Curtis A. Campbell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Tammy S. LoCascio	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Lisa M. Nelson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Annual incentives are primarily based on objective financial goals, while the LTI is based on pre-set financial metrics measured over a multi-year performance period.</i>						
3	Eliminate Supermajority Vote Requirement to Amend Certificate of Incorporation and Bylaws	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i>						
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Jack Henry & Associates, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/16/2024	Auto-Approved 10/16/2024	Shares Confirmed 10/29/2024	392	392
Total Shares:						392	392

Broadridge Financial Solutions, Inc.

Meeting Date: 11/14/2024	Country: USA	Ticker: BR	Proxy Level: 3
Record Date: 09/18/2024	Meeting Type: Annual	Meeting ID: 1901924	
Primary Security ID: 11133T103	Primary CUSIP: 11133T103	Primary ISIN: US11133T1034	Primary SEDOL: B1VP7R6
Votable Shares: 85	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 85
	*Shares on Loan: 0	Shares Instructed: 85	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Pamela L. Carter	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Richard J. Daly	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Robert N. Duelsks	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Melvin L. Flowers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Timothy C. Gokey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Brett A. Keller	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Maura A. Markus	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Eileen K. Murray	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Annette L. Nazareth	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Amit K. Zavery	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Broadridge Financial Solutions, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Annual incentives are primarily based on pre-set financial goals, and the company targets half of the LTI awards to be performance-based and measured over a multi-year period.</i></p>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	85	85
			10/11/2024	10/15/2024	10/16/2024		
Total Shares:						85	85

Oracle Corporation

Meeting Date: 11/14/2024	Country: USA	Ticker: ORCL	Proxy Level: 3
Record Date: 09/16/2024	Meeting Type: Annual	Meeting ID: 1900450	
Primary Security ID: 68389X105	Primary CUSIP: 68389X105	Primary ISIN: US68389X1054	Primary SEDOL: 2661568
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 2,064	*Shares on Loan: 0	Shares Instructed: 2,064	Shares Voted: 2,064

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Awo Ablo	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Jeffrey S. Berg	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent Governance Committee members Jeffrey Berg, Bruce Chizen, Leon Panetta, and William Parrett for the substantial pledging activity and significant concerns regarding risk oversight. A vote FOR the remaining directors is warranted.</i></p>							
1.3	Elect Director Michael J. Boskin	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.4	Elect Director Safra A. Catz	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.5	Elect Director Bruce R. Chizen	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes are warranted for incumbent Governance Committee members Jeffrey Berg, Bruce Chizen, Leon Panetta, and William Parrett for the substantial pledging activity and significant concerns regarding risk oversight. A vote FOR the remaining directors is warranted.</i></p>							
1.6	Elect Director George H. Conrades	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Lawrence J. Ellison	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Rona A. Fairhead	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Jeffrey O. Henley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Charles W. Moorman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Leon E. Panetta	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent Governance Committee members Jeffrey Berg, Bruce Chizen, Leon Panetta, and William Parrett for the substantial pledging activity and significant concerns regarding risk oversight. A vote FOR the remaining directors is warranted.</i>							
1.12	Elect Director William G. Parrett	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent Governance Committee members Jeffrey Berg, Bruce Chizen, Leon Panetta, and William Parrett for the substantial pledging activity and significant concerns regarding risk oversight. A vote FOR the remaining directors is warranted.</i>							
1.13	Elect Director Naomi O. Seligman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the proposal is warranted. While CEO pay and company performance were reasonably aligned for the year in review, there are concerns noted within the pay program. Most notably, annual equity grants to certain NEOs do not utilize performance-conditioned equity, which is inconsistent with prevailing market practices as well as contrary to recent shareholder feedback. Additionally, though disclosure surrounding security fees to Chairman Ellison improved in FY24, continued monitoring is warranted, as the value of this perquisite remains outsized.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.57 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Report on Climate Risk in Retirement Plan Options	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this resolution is warranted. While the company offers an option to employees that want to invest more responsibly, it is unclear how well employees understand the retirement plans available to them. The information requested in the report would not only complement and enhance the company's existing commitments regarding climate change, but also allow shareholders to better evaluate the company's strategies and management of related risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	2,064	2,064
			10/23/2024	10/23/2024	10/24/2024		
Total Shares:						2,064	2,064

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Tapestry, Inc.

Meeting Date: 11/14/2024	Country: USA	Ticker: TPR	Proxy Level: 3
Record Date: 09/18/2024	Meeting Type: Annual	Meeting ID: 1901151	
Primary Security ID: 876030107	Primary CUSIP: 876030107	Primary ISIN: US8760301072	Primary SEDOL: BF09HX3

Total Ballots: 2	Voting Policy: UUA
Votable Shares: 199	*Shares on Loan: 0
	Shares Instructed: 199
	Shares Voted: 199

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John P. Bilbrey (J.P.)	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Darrell Cavens	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Joanne Crevoiserat	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director David Elkins	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Johanna (Hanneke) Faber	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Anne Gates	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Thomas Greco	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Kevin Hourican	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Alan Lau	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Pamela Lifford	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Annabelle Yu Long	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 17.62 percent of the fees paid to the auditor are for non-audit purposes.</i>						

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Tapestry, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance were reasonably aligned for the year under consideration. Though equity awards remain largely time-based and disclosure could be improved for performance shares, the PSUs were based on a three-year performance period. Moreover, annual incentives were predominantly based on pre-set objective metrics.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/11/2024	Auto-Approved 10/15/2024	Shares Confirmed 10/16/2024	116	116
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 10/11/2024	Auto-Approved 10/15/2024	Shares Confirmed 10/16/2024	83	83
Total Shares:						199	199

Sysco Corporation

Meeting Date: 11/15/2024	Country: USA	Ticker: SYU	Proxy Level: 3
Record Date: 09/16/2024	Meeting Type: Annual	Meeting ID: 1902263	
Primary Security ID: 871829107	Primary CUSIP: 871829107	Primary ISIN: US8718291078	Primary SEDOL: 2868165
Votable Shares: 1,568	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,568	Shares Voted: 1,568

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel J. Brutto	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Francesca DeBiase	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Ali Dibadj	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Larry C. Glasscock	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Jill M. Golder	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Bradley M. Halverson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director John M. Hinshaw	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Sysco Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Kevin P. Hourican	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Roberto Marques	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Alison Kenney Paul	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Sheila G. Talton	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance appear reasonably aligned. The annual incentive program was primarily based on pre-set objective metrics with performance targets set above the previous year. Half of the long-term equity awards were performance conditioned and performance shares are measured over multi-year periods.</i>							
3	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the purchase price and the number of shares reserved are reasonable, and the offering period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							
4	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.39 percent of the fees paid to the auditor are for non-audit purposes.</i>							
5	Adopt Measurable Time Bound Goals to Ensure Group Sow Housing for Private Brand Pork Products	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this resolution is warranted. In light of regulatory developments and the company's lack of disclosure, shareholders would benefit from more information on the company's practices related to reducing or eliminating the use of gestation crates in its pork supply chain.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/25/2024	Auto-Approved 10/25/2024	Shares Confirmed 10/26/2024	1,568	1,568
Total Shares:						1,568	1,568

Campbell Soup Company

Meeting Date: 11/19/2024	Country: USA	Ticker: CPB	Proxy Level: 3
Record Date: 09/25/2024	Meeting Type: Annual	Meeting ID: 1903273	
Primary Security ID: 134429109	Primary CUSIP: 134429109	Primary ISIN: US1344291091	Primary SEDOL: 2162845

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 840

*Shares on Loan: 0

Shares Instructed: 840

Shares Voted: 840

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Fabiola R. Arredondo	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.2	Elect Director Howard M. Averill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Mark A. Clouse	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Bennett Dorrance, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Maria Teresa (Tessa) Hilado	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Grant H. Hill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Sarah Hofstetter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Marc B. Lautenbach	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Mary Alice Dorrance Malone	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Keith R. McLoughlin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Kurt T. Schmidt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.12	Elect Director Archbold D. van Beuren	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 16.58 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Campbell Soup Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Although a concern is noted in the STI regarding goal rigor, the company provided sufficient rationale and exercised negative discretion to decrease the payout. There is also concern in the LTI program as the proxy does not disclose a cap on payouts should absolute TSR be negative over the performance period. Nonetheless, the STI and LTI programs are primarily performance-based with the LTI utilizing a multi-year performance period.</i></p>							
4	Change Company Name to The Campbell's Company	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted give that it is unlikely that the name change would have a negative financial impact on the company.</i></p>							
5	Publish Results of Independent Audit Assessing Effectiveness of Company's Diversity, Equity and Inclusion Efforts	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this resolution is warranted, as reporting quantitative and comparable diversity statistics would allow shareholders to better assess the effectiveness of the company's diversity initiatives and its management of related risks.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/29/2024	Auto-Approved 10/29/2024	Shares Confirmed 11/05/2024	840	840
Total Shares:						840	840

Lumentum Holdings Inc.

Meeting Date: 11/20/2024	Country: USA	Ticker: LITE	Proxy Level: 3
Record Date: 09/26/2024	Meeting Type: Annual	Meeting ID: 1902262	
Primary Security ID: 55024U109	Primary CUSIP: 55024U109	Primary ISIN: US55024U1097	Primary SEDOL: BYM9ZP2
Votable Shares: 168	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 168	Shares Voted: 168

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Penelope A. Herscher	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Harold L. Covert	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Pamela F. Fletcher	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Isaac H. Harris	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Lumentum Holdings Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Julia S. Johnson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Brian J. Lillie	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Alan S. Lowe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Ian S. Small	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels.</i>						
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive - The plan allows broad discretion to accelerate vesting</i>						
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.47 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	168	168
			11/08/2024	11/08/2024	11/09/2024		
					Total Shares:	168	168

Performance Food Group Company

Meeting Date: 11/20/2024	Country: USA	Ticker: PFGC	Proxy Level: 3
Record Date: 09/30/2024	Meeting Type: Annual	Meeting ID: 1903642	
Primary Security ID: 71377A103	Primary CUSIP: 71377A103	Primary ISIN: US71377A1034	Primary SEDOL: BYVYD43
	Total Ballots: 2	Voting Policy: UUA	
Votable Shares: 2,472	*Shares on Loan: 0	Shares Instructed: 2,472	Shares Voted: 2,472

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director George L. Holm	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Performance Food Group Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Manuel A. Fernandez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Barbara J. Beck	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Danielle M. Brown	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director William F. Dawson, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Laura Flanagan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Matthew C. Flanigan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Kimberly S. Grant	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Jeffrey M. Overly	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director David V. Singer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Randall N. Spratt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Warren M. Thompson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 11.39 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Performance Food Group Company

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/25/2024	Auto-Approved 10/25/2024	Shares Confirmed 10/26/2024	602	602
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 10/25/2024	Auto-Approved 10/25/2024	Shares Confirmed 10/26/2024	1,870	1,870
Total Shares:						2,472	2,472

The Clorox Company

Meeting Date: 11/20/2024	Country: USA	Ticker: CLX	Proxy Level: 3
Record Date: 09/23/2024	Meeting Type: Annual	Meeting ID: 1902601	
Primary Security ID: 189054109	Primary CUSIP: 189054109	Primary ISIN: US1890541097	Primary SEDOL: 2204026
Votable Shares: 522	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 522	Shares Voted: 522

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Stephen B. Bratspies	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Pierre R. Breber	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Julia Denman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Spencer C. Fleischer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Esther Lee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director A.D. David Mackay	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Stephanie Plaines	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Linda Rendle	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Matthew J. Shattock	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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The Clorox Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Russell J. Weiner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Christopher J. Williams	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Some concern is raised where an STI metric was set below the prior year's actual results, although the committee exercised negative discretion to lower the payout. Annual incentives are primarily based on financial metrics, while performance-based equity represents the majority of the annual equity awards.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.76 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 10/24/2024	Auto-Approved 10/24/2024	Shares Confirmed 11/20/2024	522	522
Total Shares:						522	522

Western Digital Corporation

Meeting Date: 11/20/2024	Country: USA	Ticker: WDC	Proxy Level: 3
Record Date: 09/23/2024	Meeting Type: Annual	Meeting ID: 1902944	
Primary Security ID: 958102105	Primary CUSIP: 958102105	Primary ISIN: US9581021055	Primary SEDOL: 2954699
Votable Shares: 222	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 222	Shares Voted: 222

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kimberly E. Alexy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Thomas Caulfield	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Martin I. Cole	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Tunc Doluca	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Western Digital Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director David V. Goeckeler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Matthew E. Massengill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Stephanie A. Streater	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Miyuki Suzuki	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - A majority of equity awards to the CEO are not tied to performance-contingent pay elements; - High CEO pay relative to company performance compared to the company's peers.</i>							
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/01/2024	Auto-Approved 11/01/2024	Shares Confirmed 11/02/2024	222	222
Total Shares:						222	222

Avnet, Inc.

Meeting Date: 11/22/2024	Country: USA	Ticker: AVT	Proxy Level: 3
Record Date: 09/23/2024	Meeting Type: Annual	Meeting ID: 1903168	
Primary Security ID: 053807103	Primary CUSIP: 053807103	Primary ISIN: US0538071038	Primary SEDOL: 2066505
Votable Shares: 4,446	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 4,446	Shares Voted: 4,446

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney C. Adkins	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Brenda L. Freeman	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Philip R. Gallagher	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Helmut Gassel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Virginia L. Henkels	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Jo Ann Jenkins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Oleg Khaykin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Ernest E. Maddock	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Avid Modjtabai	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Adalio T. Sanchez	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.57 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/04/2024	Auto-Approved 11/04/2024	Shares Confirmed 11/05/2024	4,446	4,446
Total Shares:						4,446	4,446

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Aptiv Plc

Meeting Date: 12/02/2024	Country: Jersey	Ticker: APTV	Proxy Level: N/A
Record Date: 10/31/2024	Meeting Type: Extraordinary Shareholders	Meeting ID: 1909540	
Primary Security ID: G6095L109	Primary CUSIP: G6095L109	Primary ISIN: JE00B783TY65	Primary SEDOL: B783TY6

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 1,042	*Shares on Loan: 0
	Shares Instructed: 1,042
	Shares Voted: 1,042

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Approve Scheme of Arrangement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the underlying board rationale appears reasonable and shareholder rights would not be materially diminished as a result of the Swiss tax residency.</i>							
2	Approve Merger Agreement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the underlying board rationale appears reasonable and shareholder rights would not be materially diminished as a result of the Swiss tax residency.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/19/2024	Auto-Approved 11/19/2024		1,042	1,042
Total Shares:						1,042	1,042

Aptiv Plc

Meeting Date: 12/02/2024	Country: Jersey	Ticker: APTV	Proxy Level: N/A
Record Date: 10/31/2024	Meeting Type: Court	Meeting ID: 1909542	
Primary Security ID: G6095L109	Primary CUSIP: G6095L109	Primary ISIN: JE00B783TY65	Primary SEDOL: B783TY6

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 1,042	*Shares on Loan: 0
	Shares Instructed: 1,042
	Shares Voted: 1,042

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Court Meeting	Mgmt	No				
1	Approve Scheme of Arrangement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the underlying board rationale appears reasonable and shareholder rights would not be materially diminished as a result of the Swiss tax residency.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/19/2024	Auto-Approved 11/19/2024		1,042	1,042
Total Shares:						1,042	1,042

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Madison Square Garden Sports Corp.

Meeting Date: 12/04/2024	Country: USA	Ticker: MSGS	Proxy Level: 3
Record Date: 10/15/2024	Meeting Type: Annual	Meeting ID: 1906251	
Primary Security ID: 55825T103	Primary CUSIP: 55825T103	Primary ISIN: US55825T1034	Primary SEDOL: BYQCZ35
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 122	*Shares on Loan: 0	Shares Instructed: 122	Shares Voted: 122

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Joseph M. Cohen	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Joseph Cohen, Richard Parsons, Nelson Peltz, Ivan Seidenberg, and Anthony (Tony) Vinciguerra for maintaining a multi-class structure with disparate voting rights that is not subject to a reasonable time-based sunset provision.</i>						
1.2	Elect Director Richard D. Parsons	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Joseph Cohen, Richard Parsons, Nelson Peltz, Ivan Seidenberg, and Anthony (Tony) Vinciguerra for maintaining a multi-class structure with disparate voting rights that is not subject to a reasonable time-based sunset provision.</i>						
1.3	Elect Director Nelson Peltz	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Joseph Cohen, Richard Parsons, Nelson Peltz, Ivan Seidenberg, and Anthony (Tony) Vinciguerra for maintaining a multi-class structure with disparate voting rights that is not subject to a reasonable time-based sunset provision.</i>						
1.4	Elect Director Ivan Seidenberg	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Joseph Cohen, Richard Parsons, Nelson Peltz, Ivan Seidenberg, and Anthony (Tony) Vinciguerra for maintaining a multi-class structure with disparate voting rights that is not subject to a reasonable time-based sunset provision.</i>						
1.5	Elect Director Anthony J. Vinciguerra	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board is not majority independent. Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Joseph Cohen, Richard Parsons, Nelson Peltz, Ivan Seidenberg, and Anthony (Tony) Vinciguerra for maintaining a multi-class structure with disparate voting rights that is not subject to a reasonable time-based sunset provision.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>						
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
4	Amend Non-Employee Director Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The shareholder value transfer appears to be within a reasonable range; - The plan does not allow for repricing of stock options without prior shareholder approval; and - The equity burn rate is reasonable.</i>						
5	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not disclosed any risk mitigators, such as a clawback policy, CEO stock ownership guidelines, or stock holding period requirements.</i>						

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Madison Square Garden Sports Corp.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/11/2024	Auto-Approved 11/11/2024	Shares Confirmed 11/15/2024	122	122
Total Shares:						122	122

Bill Holdings, Inc.

Meeting Date: 12/05/2024	Country: USA	Ticker: BILL	Proxy Level: 3
Record Date: 10/10/2024	Meeting Type: Annual	Meeting ID: 1906476	
Primary Security ID: 090043100	Primary CUSIP: 090043100	Primary ISIN: US0900431000	Primary SEDOL: BKDS4H5
Votable Shares: 2,165	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 2,165
	*Shares on Loan: 0	Shares Instructed: 2,165	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Aida Alvarez	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Aida Alvarez given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the governing documents and the classified board, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i></p>							
1.2	Elect Director Steve Fisher	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Allison Mnookin	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.4	Elect Director Alison Wagonfeld	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.25 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although the STIP had rigorous goals based on two financial metrics, concerns remain regarding the LTIP. The majority of PSUs in the LTIP are still based on a one-year performance period and the newly introduced relative TSR metric targets only median performance. Additionally, compelling rationale was not identified regarding the CEO's outsized annual equity award, especially considering that the company's TSR was negative and significantly underperformed during the year in review.</i></p>							
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i></p>							

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Bill Holdings, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 11/20/2024	Auto-Approved 11/20/2024	Shares Confirmed 11/21/2024	2,165	2,165
Total Shares:						2,165	2,165

Ferguson Enterprises Inc.

Meeting Date: 12/05/2024	Country: USA	Ticker: FERG	Proxy Level: 3
Record Date: 10/09/2024	Meeting Type: Annual	Meeting ID: 1904304	
Primary Security ID: 31488V107	Primary CUSIP: 31488V107	Primary ISIN: US31488V1070	Primary SEDOL: BS6VHW3

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 336	*Shares on Loan: 0
Shares Instructed: 336	Shares Voted: 336

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rekha Agrawal	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Kelly Baker	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Rick Beckwitt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Bill Brundage	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Geoff Drabble	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Catherine Halligan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Brian May	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director James S. Metcalf	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Kevin Murphy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Alan Murray	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Suzanne Wood	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Ferguson Enterprises Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	336	336
			11/15/2024	11/15/2024	11/16/2024		
Total Shares:						336	336

Copart, Inc.

Meeting Date: 12/06/2024	Country: USA	Ticker: CPRT	Proxy Level: 3
Record Date: 10/11/2024	Meeting Type: Annual	Meeting ID: 1906239	
Primary Security ID: 217204106	Primary CUSIP: 217204106	Primary ISIN: US2172041061	Primary SEDOL: 2208073
Votable Shares: 1	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 1
	*Shares on Loan: 0	Shares Instructed: 1	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Willis J. Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director A. Jayson Adair	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Matt Blunt	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.4	Elect Director Steven D. Cohan	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.5	Elect Director Daniel J. Englander	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

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Copart, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director James E. Meeks	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Thomas N. Tryforos	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Diane M. Morefield	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.9	Elect Director Stephen Fisher	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.10	Elect Director Cherylyn Harley LeBon	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Carl D. Sparks	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.12	Elect Director Jeffrey Liaw	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. Annual incentives were primarily based on a preset objective with increased disclosure of actual results, and regular annual equity grants to NEOs were half performance conditioned.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 26.68 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/05/2024	Auto-Approved 11/06/2024	Shares Confirmed 11/22/2024	1	1
Total Shares:						1	1

Viatrix Inc.

Meeting Date: 12/06/2024	Country: USA	Ticker: VTRS	Proxy Level: 3
Record Date: 10/11/2024	Meeting Type: Annual	Meeting ID: 1906372	
Primary Security ID: 92556V106	Primary CUSIP: 92556V106	Primary ISIN: US92556V1061	Primary SEDOL: BMWS3X9

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

		Total Ballots: 1	Voting Policy: UUA				
Votable Shares: 20		*Shares on Loan: 0	Shares Instructed: 20			Shares Voted: 20	
Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director W. Don Cornwell	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1B	Elect Director JoEllen Lyons Dillon	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1C	Elect Director Elisha Finney	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1D	Elect Director Leo Groothuis	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1E	Elect Director Melina Higgins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1F	Elect Director James M. Kilts	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1G	Elect Director Harry Korman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1H	Elect Director Rajiv Malik	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1I	Elect Director Richard Mark	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1J	Elect Director Mark Parrish	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1K	Elect Director Scott A. Smith	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1L	Elect Director Rogerio Vivaldi Coelho	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although CEO pay and performance are reasonably aligned for the year under review, significant concern is raised regarding the outsized magnitude and insufficient rationale pertaining to pay arrangements of former executive chairman Robert Coury in his capacity as an advisor to the board following his resignation from the executive chairman role. The company has not disclosed a compelling rationale for maintaining Coury's compensation at a level commensurate with the CEO's pay despite his reduced capacity as a strategic advisor, which is particularly concerning on the heels of a sizable severance payout.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 9.04 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Viatrix Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 11/25/2024	Auto-Approved 11/25/2024		20	20
Total Shares:						20	20

Cisco Systems, Inc.

Meeting Date: 12/09/2024	Country: USA	Ticker: CSCO	Proxy Level: 3
Record Date: 10/10/2024	Meeting Type: Annual	Meeting ID: 1905046	
Primary Security ID: 17275R102	Primary CUSIP: 17275R102	Primary ISIN: US17275R1023	Primary SEDOL: 2198163
Votable Shares: 7,360	Total Ballots: 2	Voting Policy: UUA	Shares Voted: 7,360
	*Shares on Loan: 0	Shares Instructed: 7,360	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wesley G. Bush	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Michael D. Capellas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Mark Garrett	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1d	Elect Director John D. Harris, II	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Kristina M. Johnson	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1f	Elect Director Sarah Rae Murphy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Charles H. Robbins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Daniel H. Schulman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Marianna Tessel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Cisco Systems, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels. Shareholders should also note a certain number of concerning features that are raised within the pay program, most notably the lowering of one target in the LTI program, the extensive use of one-year performance periods for performance equity, and the increase in the annual equity grant value.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/21/2024	Auto-Approved 11/21/2024		7,160	7,160
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 11/21/2024	Auto-Approved 11/21/2024		200	200
Total Shares:						7,360	7,360

Smartsheet Inc.

Meeting Date: 12/09/2024	Country: USA	Ticker: SMAR	Proxy Level: 5
Record Date: 10/25/2024	Meeting Type: Special	Meeting ID: 1909090	
Primary Security ID: 83200N103	Primary CUSIP: 83200N103	Primary ISIN: US83200N1037	Primary SEDOL: BФЗND98
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 2,005	*Shares on Loan: 0	Shares Instructed: 2,005	Shares Voted: 2,005

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: The sales process appears reasonable, shareholders are receiving a meaningful premium, there is a potential downside risk of non-approval, and the cash consideration provides liquidity and certainty of value. Given these factors, support FOR the proposed transaction is warranted.</i></p>							
2	Advisory Vote on Golden Parachutes	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although a majority of outstanding equity will auto-accelerate at the time of merger, cash severance is double trigger and of a reasonable basis, with no excise tax gross-ups payable.</i></p>							
3	Adjourn Meeting	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this agenda item is warranted as the underlying transaction warrants support.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 11/20/2024	Auto-Approved 11/20/2024	Shares Confirmed 11/21/2024	2,005	2,005

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Microsoft Corporation

Meeting Date: 12/10/2024 **Country:** USA **Ticker:** MSFT **Proxy Level:** 3
Record Date: 09/30/2024 **Meeting Type:** Annual **Meeting ID:** 1906254
Primary Security ID: 594918104 **Primary CUSIP:** 594918104 **Primary ISIN:** US5949181045 **Primary SEDOL:** 2588173

Total Ballots: 2 **Voting Policy:** UUA
Votable Shares: 3,423 ***Shares on Loan:** 0 **Shares Instructed:** 3,423 **Shares Voted:** 3,423

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Reid G. Hoffman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Hugh F. Johnston	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Teri L. List	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Catherine MacGregor	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Mark A. L. Mason	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Satya Nadella	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Sandra E. Peterson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Penny S. Pritzker	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Carlos A. Rodriguez	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Charles W. Scharf	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director John W. Stanton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director Emma N. Walmsley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are aligned for the year in review. Annual incentives were primarily based on objective criteria and the CEO's long-term awards were entirely performance-conditioned. The cash incentive payout was reduced at the CEO's request this year. However, the CEO's base salary and STI payout opportunities remained relatively large and long-term incentives rely primarily on annual performance periods.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.81 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Report on Risks of Weapons Development	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted as the requested report would allow shareholders to better understand Microsoft's management and oversight of risks related to weapons development.</i>						
5	Assess and Report on Investing in Bitcoin	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, given that the company already considers potential investments in Bitcoin and other cryptocurrencies as part of its investment portfolio.</i>						
6	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: see screen note</i>						
7	Report on Risks of Using Artificial Intelligence and Machine Learning Tools for Oil and Gas Development and Production	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as shareholders would benefit from additional disclosure related to the potential risks associated with the use of the company's artificial intelligence and machine learning tools for new oil and gas development and production.</i>						
8	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Increased disclosure and greater transparency regarding risks related to misinformation and disinformation, including from generative AI, would benefit shareholders on its potential business impacts and how the company is managing these risks.</i>						
9	Report on AI Data Sourcing Accountability	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted as the company is facing increased risks related to copyright infringement and AI data sourcing. Although it discloses information about its assessment of AI risks generally, shareholders would benefit from greater attention to risks related to how the company uses third-party information to train its large language models.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumbline Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	418	418
			11/22/2024	11/22/2024	11/23/2024		
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	3,005	3,005
			11/22/2024	11/22/2024	11/23/2024		

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Atlassian Corporation

Meeting Date: 12/11/2024 Country: USA Ticker: TEAM Proxy Level: 3
 Record Date: 10/14/2024 Meeting Type: Annual Meeting ID: 1906021
 Primary Security ID: 049468101 Primary CUSIP: 049468101 Primary ISIN: US0494681010 Primary SEDOL: BQ1PC76

Total Ballots: 1 Voting Policy: UUA
 Votable Shares: 3,044 *Shares on Loan: 0 Shares Instructed: 3,044 Shares Voted: 3,044

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Scott Belsky	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Shona L. Brown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Michael Cannon-Brookes	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST Governance Committee members Heather Fernandez, Enrique Salem, and Richard (Rich) Wong is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote AGAINST director nominees Michael (Mike) Cannon-Brookes and Scott Farquhar is warranted as their ownership of the supervoting shares provides them with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i>						
1d	Elect Director Scott Farquhar	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST Governance Committee members Heather Fernandez, Enrique Salem, and Richard (Rich) Wong is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote AGAINST director nominees Michael (Mike) Cannon-Brookes and Scott Farquhar is warranted as their ownership of the supervoting shares provides them with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i>						
1e	Elect Director Heather M. Fernandez	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST Governance Committee members Heather Fernandez, Enrique Salem, and Richard (Rich) Wong is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote AGAINST director nominees Michael (Mike) Cannon-Brookes and Scott Farquhar is warranted as their ownership of the supervoting shares provides them with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i>						
1f	Elect Director Sasan Goodarzi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Jay Parikh	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Enrique Salem	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. A vote AGAINST Governance Committee members Heather Fernandez, Enrique Salem, and Richard (Rich) Wong is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote AGAINST director nominees Michael (Mike) Cannon-Brookes and Scott Farquhar is warranted as their ownership of the supervoting shares provides them with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i>						
1i	Elect Director Steven Sordello	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Atlassian Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Richard P. Wong	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST Governance Committee members Heather Fernandez, Enrique Salem, and Richard (Rich) Wong is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote AGAINST director nominees Michael (Mike) Cannon-Brookes and Scott Farquhar is warranted as their ownership of the supervoting shares provides them with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i></p>							
1k	Elect Director Michelle Zatlyn	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.21 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not disclosed any risk mitigators, such as a clawback policy, CEO stock ownership guidelines, or stock holding period requirements.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Sands Capital Mgmt, 6728029078	6728029078	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	3,044	3,044
			11/19/2024	11/19/2024	11/22/2024		
Total Shares:						3,044	3,044

Fabrinet

Meeting Date: 12/12/2024	Country: Cayman Islands	Ticker: FN	Proxy Level: N/A
Record Date: 10/16/2024	Meeting Type: Annual	Meeting ID: 1905757	
Primary Security ID: G3323L100	Primary CUSIP: G3323L100	Primary ISIN: KYG3323L1005	Primary SEDOL: B4JSZL8
Votable Shares: 379	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 379	Shares Voted: 379

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Forbes I.J. Alexander	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
1.2	Elect Director Frank H. Levinson	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
1.3	Elect Director David T. (Tom) Mitchell	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify PricewaterhouseCoopers ABAS Ltd. as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	379	379
			11/21/2024	11/21/2024	11/23/2024		
Total Shares:						379	379

Aspen Technology, Inc.

Meeting Date: 12/17/2024	Country: USA	Ticker: AZPN	Proxy Level: 3
Record Date: 10/18/2024	Meeting Type: Annual	Meeting ID: 1906252	
Primary Security ID: 29109X106	Primary CUSIP: 29109X106	Primary ISIN: US29109X1063	Primary SEDOL: BP2V812
Votable Shares: 52	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 52
	*Shares on Loan: 0	Shares Instructed: 52	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Patrick M. Antkowiak	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Thomas F. Bogan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Karen M. Golz	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director David J. Henshall	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Ram R. Krishnan	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: The nominee is non-independent and sits on a key committee.</i>							
1f	Elect Director Antonio J. Pietri	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Arlen R. Shenkman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Aspen Technology, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Robert M. Whelan, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.41 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 12/09/2024	Auto-Approved 12/09/2024		52	52
Total Shares:						52	52

AutoZone, Inc.

Meeting Date: 12/18/2024	Country: USA	Ticker: AZO	Proxy Level: 4
Record Date: 10/21/2024	Meeting Type: Annual	Meeting ID: 1908282	
Primary Security ID: 053332102	Primary CUSIP: 053332102	Primary ISIN: US0533321024	Primary SEDOL: 2065955
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 64	*Shares on Loan: 0	Shares Instructed: 64	Shares Voted: 64

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Philip B. Daniele, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Michael A. George	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Linda A. Goodspeed	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Earl G. Graves, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Brian P. Hannasch	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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AutoZone, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director Gale V. King	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director George R. Mrkonic, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director William C. Rhodes, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Jill A. Soltau	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.69 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as pay and performance were sufficiently aligned for the year in review. Annual incentives were primarily based and the committee intends to introduce premium-priced options as part of the CEO's LTI award in FY25, mitigating ongoing concerns regarding the lack of any pre-set performance goals for the CEO's LTI.</i>							
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting to 25%	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as reducing the ownership threshold to call a special meeting from 50 percent to 25 percent would represent an improvement to the current right.</i>							
5	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as it would enhance the existing shareholder right to call special meetings.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 12/02/2024	Auto-Approved 12/02/2024	Shares Confirmed 12/04/2024	64	64
Total Shares:						64	64

FactSet Research Systems Inc.

Meeting Date: 12/19/2024	Country: USA	Ticker: FDS	Proxy Level: 3
Record Date: 10/21/2024	Meeting Type: Annual	Meeting ID: 1907967	
Primary Security ID: 303075105	Primary CUSIP: 303075105	Primary ISIN: US3030751057	Primary SEDOL: 2329770

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 90

*Shares on Loan: 0

Shares Instructed: 90

Shares Voted: 90

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Siew Kai Choy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Laurie G. Hylton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Lee Shavel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Elisha Wiesel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 12.63 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Annual incentives are primarily based on objective financial metrics and half of the equity awards are targeted to be performance conditioned.</i>							
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as a lower ownership threshold to call a special meeting would improve shareholder rights.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 11/27/2024	Auto-Approved 11/27/2024	Shares Confirmed 11/30/2024	90	90
Total Shares:						90	90

Micron Technology, Inc.

Meeting Date: 01/16/2025

Country: USA

Ticker: MU

Proxy Level: 3

Record Date: 11/18/2024

Meeting Type: Annual

Meeting ID: 1913542

Primary Security ID: 595112103

Primary CUSIP: 595112103

Primary ISIN: US5951121038

Primary SEDOL: 2588184

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 1,905

*Shares on Loan: 0

Shares Instructed: 1,905

Shares Voted: 1,905

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard M. Beyer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Micron Technology, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Lynn A. Dugle	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Steven J. Gomo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Linnie M. Haynesworth	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Mary Pat McCarthy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Sanjay Mehrotra	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Robert Swan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director MaryAnn Wright	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time, and the company has provided more substantial disclosure of performance objectives for the incentive programs.</i>							
3	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 13.08 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Rhumblin Custom S&P Index, 6728029082	6728029082	Confirmed	Auto-Instructed 12/17/2024	Auto-Approved 12/17/2024	Shares Confirmed 12/18/2024	1,905	1,905
Total Shares:						1,905	1,905

Air Products and Chemicals, Inc.

Meeting Date: 01/23/2025	Country: USA	Ticker: APD	Proxy Level: 6
Record Date: 11/27/2024	Meeting Type: Proxy Contest	Meeting ID: 1914881	
Primary Security ID: 009158106	Primary CUSIP: 009158106	Primary ISIN: US0091581068	Primary SEDOL: 2011602

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Air Products and Chemicals, Inc.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 37

*Shares on Loan: 0

Shares Instructed: 37

Shares Voted: 37

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	Management Universal Proxy (White Proxy Card)	Mgmt	No				
	From the Combined List of Management & Dissident Nominees - Elect 9 Directors	Mgmt	No				
1a	Elect Management Nominee Director Tonit M. Calaway	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1b	Elect Management Nominee Director Charles "Casey" Cogut	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1c	Elect Management Nominee Director Lisa A. Davis	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1d	Elect Management Nominee Director Seifollah "Seifi" Ghasemi	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1e	Elect Management Nominee Director Jessica Trocchi Graziano	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1f	Elect Management Nominee Director Edward L. Monser	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1g	Elect Management Nominee Director Bhavesh V. "Bob" Patel	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1h	Elect Management Nominee Director Wayne T. Smith	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1i	Elect Management Nominee Director Alfred Stern	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1j	Elect Dissident Nominee Director Andrew Evans	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1k	Elect Dissident Nominee Director Paul Hilal	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
1l	Elect Dissident Nominee Director Tracy McKibben	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						

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Air Products and Chemicals, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1m	Elect Dissident Nominee Director Dennis Reilley	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
4	Repeal Any Bylaw Provisions or Amendments Without Shareholder Approval Subsequent to September 17, 2023	SH	Yes	Against	Do Not Vote	Do Not Vote	Do Not Vote
	<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>						
	Dissident Universal Proxy (Blue Proxy Card)	Mgmt	No				
	From the Combined List of Management & Dissident Nominees - Elect 9 Directors	Mgmt	No				
1a	Elect Dissident Nominee Director Andrew Evans	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1b	Elect Dissident Nominee Director Paul Hilal	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1c	Elect Dissident Nominee Director Tracy McKibben	SH	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1d	Elect Dissident Nominee Director Dennis Reilley	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						

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Air Products and Chemicals, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Management Nominee Director Charles "Casey" Cogut	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1f	Elect Management Nominee Director Lisa A. Davis	Mgmt	Yes	Withhold	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1g	Elect Management Nominee Director Seifollah "Seifi" Ghasemi	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1h	Elect Management Nominee Director Edward L. Monser	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1i	Elect Management Nominee Director Tonit M. Calaway	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1j	Elect Management Nominee Director Jessica Trocchi Graziano	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						
1k	Elect Management Nominee Director Bhavesh V. "Bob" Patel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i>						

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Air Products and Chemicals, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1l	Elect Management Nominee Director Wayne T. Smith	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i></p>							
1m	Elect Management Nominee Director Alfred Stern	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Shareholders are recommended to vote FOR dissident nominees Reilley, Evans, and Hilal and to WITHHOLD from company nominees Ghasemi, Monser, and Cogut. Given that three seats should provide the dissident nominees a sufficient presence on the board, while allowing for a more robust discussion of the optimal path forward, shareholders are also recommended to WITHHOLD votes from the fourth dissident nominee, McKibben, and to vote FOR targeted incumbent director Davis.</i></p>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	None	For	For	For
<p><i>Voting Policy Rationale: There is some concern raised regarding the continued practice of above-median benchmarking. However, annual incentives are primarily based on a rigorous pre-set financial metric, long-term incentives remain majority performance-conditioned, and the company will raise the relative TSR target for performance shares and include a vesting cap in the event TSR is negative beginning with FY25 equity grants. Additionally, pay and performance are reasonably aligned at this time. A vote FOR this proposal is warranted.</i></p>							
4	Repeal Any Bylaw Provisions or Amendments Without Shareholder Approval Subsequent to September 17, 2023	SH	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted given support for the underlying dissident case for change, and the fact that there seems to be little downside risk to shareholders in approving this specific request.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 01/13/2025	Auto-Approved 01/13/2025		37	37
Total Shares:						37	37

Visa Inc.

Meeting Date: 01/28/2025	Country: USA	Ticker: V	Proxy Level: 3
Record Date: 12/02/2024	Meeting Type: Annual	Meeting ID: 1915889	
Primary Security ID: 92826C839	Primary CUSIP: 92826C839	Primary ISIN: US92826C8394	Primary SEDOL: B2PZN04

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 140

*Shares on Loan: 0

Shares Instructed: 140

Shares Voted: 140

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director Kermit R. Crawford	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1d	Elect Director Ramon Laguarta	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Teri L. List	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director John F. Lundgren	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Ryan McInerney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Denise M. Morrison	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Pamela Murphy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Linda J. Rendle	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Although concerns exist under the STIP for lack of disclosure of metric weightings and in the LTIP for the use of annual measurements, both programs are primarily performance-based.</i>						
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.93 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this resolution is warranted as the company appears to provide competitive health benefits, and there is no evidence that the company is offering health care in a discriminatory manner.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
5	Report on Company's Policy on Merchant Category Codes	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - the company appears to be taking appropriate action to mitigate risks associated with the potential implementation of merchant category code for standalone gun and ammunition stores; and - the requested report would unduly interfere with management's purview regarding the operation of its payment systems and compliance with legal responsibilities.</i></p>							
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as there are no recurring issues or company-specific factors at Visa that suggest the proponent's more stringent director resignation policy is necessary at this time.</i></p>							
7	Report on Lobbying Payments and Policy	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Additional disclosure of the dues paid to trade associations and the percentage of dues used for lobbying would better position shareholders to evaluate the alignment between the company's political efforts and stated goals.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 01/09/2025	Auto-Approved 01/09/2025		140	140
Total Shares:						140	140

Powell Industries, Inc.

Meeting Date: 02/19/2025	Country: USA	Ticker: POWL	Proxy Level: 3
Record Date: 01/02/2025	Meeting Type: Annual	Meeting ID: 1920688	
Primary Security ID: 739128106	Primary CUSIP: 739128106	Primary ISIN: US7391281067	Primary SEDOL: 2697422

Votable Shares: 475	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 475
	*Shares on Loan: 0	Shares Instructed: 475	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Brett A. Cope	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director John G. Stacey	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Richard E. Williams	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							

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Powell Industries, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Amend Certificate of Incorporation to Provide for the Exculpation of Certain Officers	Mgmt	Yes	For	For	For	For

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 01/24/2025	Auto-Approved 01/24/2025	Shares Confirmed 01/31/2025	475	475
Total Shares:						475	475

Apple Inc.

Meeting Date: 02/25/2025	Country: USA	Ticker: AAPL	Proxy Level: 3
Record Date: 01/02/2025	Meeting Type: Annual	Meeting ID: 1921584	
Primary Security ID: 037833100	Primary CUSIP: 037833100	Primary ISIN: US0378331005	Primary SEDOL: 2046251
Votable Shares: 224	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 224	Shares Voted: 224

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda Austin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Tim Cook	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Alex Gorsky	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Andrea Jung	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1e	Elect Director Art Levinson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Monica Lozano	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Ron Sugar	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Sue Wagner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.68 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Apple Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as pay and performance are reasonably aligned at this time. Although the target annual equity award for CEO Cook increased relatively significantly, the overall structure of CEO pay did not fundamentally change in FY24. Annual cash incentives continued to be based entirely on pre-set financial metrics with clearly disclosed targets and performance-based equity utilizes a multi-year performance period with relatively rigorous, forward-looking target goals clearly disclosed. Further, the company states that it has made no changes to the amount or structure of Cook's total target compensation in FY25.</i></p>							
4	Report on Ethical AI Data Acquisition and Usage	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as improved transparency would provide shareholders the ability to evaluate the benefits and risks associated with the company's use of external data in the development of its artificial intelligence (AI) projects.</i></p>							
5	Report on Child Safety Online	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as Apple has already provided an explanation for its decisions regarding its use of child sex abuse material (CSAM) identifying software.</i></p>							
6	Consider Abolishing DEI Policies, Programs, Departments, and Goals	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company provides several disclosures that relate to diversity and inclusion, and these disclosures appear to provide sufficient information for shareholders to evaluate the programs and policies in question. In addition, the company clearly provides its non-discrimination policies, it clearly discusses the board and management's role in oversight of the associated risks, and there do not appear to be any controversies related to employee diversity initiatives discriminating against employee groups at the company specifically.</i></p>							
7	Report on Discrimination in Charitable Contributions	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Absent self-dealing or gross negligence, management should be afforded discretion in determining the company's charitable giving strategy.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 02/07/2025	Auto-Approved 02/07/2025	Shares Confirmed 02/11/2025	224	224
Total Shares:						224	224

Charter Communications, Inc.

Meeting Date: 02/26/2025	Country: USA	Ticker: CHTR	Proxy Level: 5
Record Date: 01/13/2025	Meeting Type: Special	Meeting ID: 1923193	
Primary Security ID: 16119P108	Primary CUSIP: 16119P108	Primary ISIN: US16119P1084	Primary SEDOL: BZ6VT82
Votable Shares: 40	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 40	Shares Voted: 40

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	Yes	For	For	For	For

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Charter Communications, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Issue Shares in Connection with Merger	Mgmt	Yes	For	For	For	For
3	Adjourn Meeting	Mgmt	Yes	For	For	For	For
Ballot Details							
Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 02/18/2025	Auto-Approved 02/18/2025	Shares Confirmed 02/20/2025	40	40
Total Shares:						40	40

Tetra Tech, Inc.

Meeting Date: 02/27/2025	Country: USA	Ticker: TTEK	Proxy Level: 3				
Record Date: 01/02/2025	Meeting Type: Annual	Meeting ID: 1922339					
Primary Security ID: 88162G103	Primary CUSIP: 88162G103	Primary ISIN: US88162G1031	Primary SEDOL: 2883890				
Votable Shares: 2,843	Total Ballots: 1	Voting Policy: UUA					
	*Shares on Loan: 0	Shares Instructed: 2,843	Shares Voted: 2,843				
Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Dan L. Batrack	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1B	Elect Director Gary R. Birkenbeuel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1C	Elect Director John M. Douglas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1D	Elect Director Prashant Gandhi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1E	Elect Director Christiana Obiaya	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1F	Elect Director Kimberly E. Ritrievi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1G	Elect Director Kirsten M. Volpi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

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Tetra Tech, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because only 1.70 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 02/18/2025	Auto-Approved 02/18/2025	Shares Confirmed 02/19/2025	2,843	2,843
Total Shares:						2,843	2,843

Schlumberger N.V.

Meeting Date: 04/02/2025	Country: Curacao	Ticker: SLB	Proxy Level: N/A
Record Date: 02/05/2025	Meeting Type: Annual	Meeting ID: 1929654	
Primary Security ID: 806857108	Primary CUSIP: 806857108	Primary ISIN: AN8068571086	Primary SEDOL: 2779201
Votable Shares: 490	Total Ballots: 1 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 490	Shares Voted: 490

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peter Coleman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Patrick de La Chevardiere	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Miguel Galuccio	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Jim Hackett	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.5	Elect Director Olivier Le Peuch	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Samuel Leupold	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Maria Moraeus Hanssen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Vanitha Narayanan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Jeff Sheets	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Schlumberger N.V.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Annual and long-term incentives were primarily performance based, and the LTIP utilizes a multi-year performance period.</i>							
3	Adopt and Approve Financials and Dividends	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: In the absence of any concerns over the company's financial statements, a vote FOR this proposal is warranted.</i>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 10.67 percent of the fees paid to the auditor are for non-audit purposes.</i>							
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - the purchase price is reasonable; - the number of shares reserved is reasonable; and - the offering period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/08/2025	Auto-Approved 03/08/2025		490	490
Total Shares:						490	490

Dow Inc.

Meeting Date: 04/10/2025	Country: USA	Ticker: DOW	Proxy Level: 3
Record Date: 02/14/2025	Meeting Type: Annual	Meeting ID: 1933641	
Primary Security ID: 260557103	Primary CUSIP: 260557103	Primary ISIN: US2605571031	Primary SEDOL: BHXCF84
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 57	*Shares on Loan: 0	Shares Instructed: 57	Shares Voted: 57

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Samuel R. Allen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Gaurdie E. Banister, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Wesley G. Bush	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Richard K. Davis	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Jerri DeVard	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Debra L. Dial	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Jeff M. Fettig	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Jim Fitterling	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Jacqueline C. Hinman	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Jacqueline (Jacque) Hinman, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Rebecca B. Liebert	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Luis Alberto Moreno	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Jill S. Wyant	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Daniel W. Yohannes	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Pay and performance are reasonably aligned for the year in review. In addition, annual incentives were primarily determined by pre-set financial metrics and a majority of long-term incentives are performance conditioned. On balance, a vote FOR this proposal is warranted.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.59 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/19/2025	Auto-Approved 03/19/2025	Shares Confirmed 04/02/2025	57	57
Total Shares:						57	57

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The Goodyear Tire & Rubber Company

Meeting Date: 04/14/2025	Country: USA	Ticker: GT	Proxy Level: 3
Record Date: 02/18/2025	Meeting Type: Annual	Meeting ID: 1937762	
Primary Security ID: 382550101	Primary CUSIP: 382550101	Primary ISIN: US3825501014	Primary SEDOL: 2378200
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 155	*Shares on Loan: 0	Shares Instructed: 155	Shares Voted: 155

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Norma B. Clayton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director James A. Firestone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Werner Geissler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Joseph R. Hinrichs	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Laurette T. Koellner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Karla R. Lewis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director John E. McGlade	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Max H. Mitchell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Hera Siu	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Mark W. Stewart	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Michael R. Wessel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Roger J. Wood	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the pay-for-performance misalignment is mitigated at this time. Annual incentives are predominantly based on pre-set financial measures and long-term incentives, including the CEO's replacement equity awards, are primarily performance-based. In addition, payouts under the incentive programs were earned below target, aligned with performance.</i>						

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The Goodyear Tire & Rubber Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.00 percent of the fees paid to the auditor are for non-audit purposes.</i>							
5	Adopt Policy to Reduce Tire Wear Shedding	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as adopting policies to set tire wear shedding reduction goals would serve to improve the company's management of risks related to microplastic pollution, including associated regulatory or reputational risk.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/25/2025	Auto-Approved 03/25/2025	Shares Confirmed 03/27/2025	155	155
Total Shares:						155	155

Fifth Third Bancorp

Meeting Date: 04/15/2025	Country: USA	Ticker: FITB	Proxy Level: 3
Record Date: 02/21/2025	Meeting Type: Annual	Meeting ID: 1935012	
Primary Security ID: 316773100	Primary CUSIP: 316773100	Primary ISIN: US3167731005	Primary SEDOL: 2336747
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 421	*Shares on Loan: 0	Shares Instructed: 421	Shares Voted: 421

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicholas K. Akins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director B. Evan Bayh, III	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Jorge L. Benitez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Katherine B. Blackburn	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Linda W. Clement-Holmes	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director C. Bryan Daniels	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Fifth Third Bancorp

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Laurent Desmangles	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Mitchell S. Feiger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Thomas H. Harvey	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Gary R. Heminger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Eileen A. Mallesch	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Kathleen A. Rogers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1m	Elect Director Timothy N. Spence	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 10.22 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned at this time. That being said, there is continued concern about the structure of the annual incentive program, which provides the committee with significant discretion. However, the initial funding pool for the annual incentives is primarily based on pre-set, quantitative metrics. Furthermore, half of long-term incentives are targeted to be based on multi-year performance, with forward-looking goals for the primary metric clearly disclosed.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/25/2025	Auto-Approved 03/25/2025	Shares Confirmed 04/02/2025	421	421
Total Shares:						421	421

Bank of America Corporation

Meeting Date: 04/22/2025	Country: USA	Ticker: BAC	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1937656	
Primary Security ID: 060505104	Primary CUSIP: 060505104	Primary ISIN: US0605051046	Primary SEDOL: 2295677

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 280

*Shares on Loan: 0

Shares Instructed: 280

Shares Voted: 280

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sharon L. Allen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Jose (Joe) E. Almeida	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Pierre J.P. de Weck	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Arnold W. Donald	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Linda P. Hudson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Monica C. Lozano	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Maria N. Martinez	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Brian T. Moynihan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Lionel L. Nowell, III	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Denise L. Ramos	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Clayton S. Rose	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Michael D. White	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Thomas D. Woods	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1n	Elect Director Maria T. Zuber	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Bank of America Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. There are significant concerns regarding the structure and lack of key disclosures under the short-term incentive determination process. Although long-term equity awards vest based on clearly disclosed multi-year goals with no upside potential, concerns are raised that equity awards are 50% (or not majority) performance-conditioned. While the process is guided by performance scorecards and various other performance considerations, award determinations are ultimately discretionary, and the committee's discretionary determinations contributed to a quantitative pay-for-performance misalignment for the year in review. Further, the proxy lacks related key disclosures, such as target and maximum pay opportunities, metric/category weightings, and quantified, preset threshold, target, and maximum goals.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.89 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factor(s): - The plan cost is excessive - The three-year average burn rate is excessive - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary) - The plan permits liberal recycling of shares - The plan allows broad discretion to accelerate vesting</i></p>							
5	Require More Director Nominations Than Open Seats	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as the proponent has not made a compelling case to suggest that mandated contested elections are necessary.</i></p>							
6	Report on Board Oversight of Material Risks Related to Animal Welfare	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Additional disclosure would help strengthen the company's stated policies and practices. In addition, the disclosure would enable shareholders to better assess the effectiveness of the company's animal welfare efforts and its management and oversight of related risks.</i></p>							
7	Report on Climate Lobbying	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Additional disclosure would help shareholders better evaluate how the company is addressing any misalignments between its direct and indirect lobbying activities and its public commitment to achieve net zero emissions by 2050.</i></p>							
8	Report on Clean Energy Supply Financing Ratio	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR the resolution asking the company to disclose its clean energy financing ratio is warranted, as it would give shareholders increased information on how the bank is progressing on its goal to align its financing activities with a net zero by 2050 pathway.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/04/2025	Auto-Approved 04/04/2025	Shares Confirmed 04/05/2025	280	280
Total Shares:						280	280

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Charter Communications, Inc.

Meeting Date: 04/22/2025	Country: USA	Ticker: CHTR	Proxy Level: 3
Record Date: 02/21/2025	Meeting Type: Annual	Meeting ID: 1940155	
Primary Security ID: 16119P108	Primary CUSIP: 16119P108	Primary ISIN: US16119P1084	Primary SEDOL: BZ6VT82
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 40	*Shares on Loan: 0	Shares Instructed: 40	Shares Voted: 40

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eric L. Zinterhofer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director W. Lance Conn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Kim C. Goodman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director John D. Markley, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director David C. Merritt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Steven A. Miron	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Balan Nair	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Michael A. Newhouse	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Martin E. Patterson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Mauricio Ramos	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Carolyn J. Slaski	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director J. David Wargo	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1m	Elect Director Christopher L. Winfrey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The purchase price is reasonable; - The number of shares reserved is reasonable; and - The offering period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>						

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Charter Communications, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 12.20 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Report on Political Contributions	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted. Additional disclosure would allow shareholders to more comprehensively evaluate the company's use of corporate funds in the political process and its management of related activities.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/26/2025	Auto-Approved 03/26/2025	Shares Confirmed 03/27/2025	40	40
Total Shares:						40	40

Churchill Downs Incorporated

Meeting Date: 04/22/2025	Country: USA	Ticker: CHDN	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1940149	
Primary Security ID: 171484108	Primary CUSIP: 171484108	Primary ISIN: US1714841087	Primary SEDOL: 2194105
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 971	*Shares on Loan: 0	Shares Instructed: 971	Shares Voted: 971

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director R. Alex Rankin	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1.2	Elect Director Andréa Carter	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Churchill Downs Incorporated

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 03/24/2025	Auto-Approved 03/24/2025		971	971
Total Shares:						971	971

Northern Trust Corporation

Meeting Date: 04/22/2025	Country: USA	Ticker: NTRS	Proxy Level: 3
Record Date: 02/24/2025	Meeting Type: Annual	Meeting ID: 1939305	
Primary Security ID: 665859104	Primary CUSIP: 665859104	Primary ISIN: US6658591044	Primary SEDOL: 2648668
Votable Shares: 52	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 52
	*Shares on Loan: 0	Shares Instructed: 52	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan Crown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Chandra Dhandapani	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Dean M. Harrison	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Jay L. Henderson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Marcy S. Klevorn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Siddharth N. "Bobby" Mehta	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Robert E. Moritz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Michael G. O'Grady	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Richard M. Petrino	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Martin P. Slark	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Northern Trust Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director David H. B. Smith, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Donald Thompson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1m	Elect Director Charles A. Tribbett, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The use of committee discretion in determining annual cash incentives continues to be a cause for concern. However, equity awards are majority performance-conditioned with disclosed targets and multi-year performance periods. Additionally, pay and performance are reasonably aligned at this time.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.69 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 03/25/2025	Auto-Approved 03/25/2025	Shares Confirmed 03/26/2025	52	52
Total Shares:						52	52

The Cigna Group

Meeting Date: 04/23/2025	Country: USA	Ticker: CI	Proxy Level: 3
Record Date: 03/04/2025	Meeting Type: Annual	Meeting ID: 1940959	
Primary Security ID: 125523100	Primary CUSIP: 125523100	Primary ISIN: US1255231003	Primary SEDOL: BHJ0775
Votable Shares: 103	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 103	Shares Voted: 103

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David M. Cordani	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Eric J. Foss	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Elder Granger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Neesha Hathi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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The Cigna Group

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director George Kurian	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Kathleen M. Mazzarella	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director Mark B. McClellan	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Philip O. Ozuah	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Kimberly A. Ross	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Eric C. Wiseman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Donna F. Zarcone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay is reasonably aligned with performance at this time. Although concerns are raised regarding the lack of disclosure of the forward-looking operating income targets under the long-term incentive program, the 2022-2024 performance share payouts were commensurate with longer-term shareholder outcomes.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.59 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Amend Right to Call Special Meeting	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The one-year holding period is not especially problematic and provides a reasonable safeguard against abuse of the right.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/01/2025	Auto-Approved 04/01/2025	Shares Confirmed 04/03/2025	103	103
Total Shares:						103	103

The Goldman Sachs Group, Inc.

Meeting Date: 04/23/2025	Country: USA	Ticker: GS	Proxy Level: 3
Record Date: 02/24/2025	Meeting Type: Annual	Meeting ID: 1940824	
Primary Security ID: 38141G104	Primary CUSIP: 38141G104	Primary ISIN: US38141G1040	Primary SEDOL: 2407966

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 25

*Shares on Loan: 0

Shares Instructed: 25

Shares Voted: 25

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michele Burns	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Mark Flaherty	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Kimberley Harris	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director John Hess	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1e	Elect Director Kevin Johnson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Ellen Kullman	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director KC McClure	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Lakshmi Mittal	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Thomas Montag	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Peter Oppenheimer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director David Solomon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Jan Tighe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director David Viniar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1n	Elect Director John Waldron	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted in light of significant concerns surrounding one-time grants made to the CEO and COO in early FY25. The \$80 million value of each award is over two times the CEO's FY24 performance year pay, which itself increased significantly year-over-year. Additionally, the awards lack rigorous, pre-set performance-vesting criteria and were granted while previously-granted off-cycle awards to the recipients remain outstanding and eligible to vest. There are also ongoing concerns regarding the discretionary process used to determine annual incentives, particularly when paired with certain lacking disclosures. A new carried interest program may result in further pay complexity going forward.</i>						

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The Goldman Sachs Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The equity program is estimated to be excessively dilutive (overriding factor) - The plan cost is excessive - The three-year average burn rate is excessive - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary) - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i></p>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
5	Consider Abolishing DEI Goals from Compensation Inducements	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. As the company does not ascribe individual weightings to the various metrics or factors considered, nor does it use quantified per-metric target goals or pre-set award opportunities, risks related to having discriminatory quotas do not appear to be material.</i></p>							
6	Conduct and Report a Third-Party Racial Equity Audit on Risks Related to Race-based Initiatives	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The board's role in oversight of the proponent's noted concerns is disclosed, and the company clearly provides its non-discrimination policies. In addition, there do not appear to be any controversies about the company's diversity initiatives driving discrimination against employees or employee groups at Goldman. Moreover, the board acknowledges that the law related to certain race-based initiatives has changed and the company has made applicable changes in response.</i></p>							
7	Report on Clean Energy Supply Financing Ratio	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR the resolution asking for the company to publish its clean energy financing ratio is warranted as it will give shareholders increased information on how the bank is progressing on its goal to align its financing activities with a net zero by 2050 pathway, its fossil fuel policy, and actions regarding corporate responsibility.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025	Shares Confirmed 04/04/2025	25	25
Total Shares:						25	25

Pfizer Inc.

Meeting Date: 04/24/2025	Country: USA	Ticker: PFE	Proxy Level: 3
Record Date: 02/26/2025	Meeting Type: Annual	Meeting ID: 1940116	
Primary Security ID: 717081103	Primary CUSIP: 717081103	Primary ISIN: US7170811035	Primary SEDOL: 2684703
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 166	*Shares on Loan: 0	Shares Instructed: 166	Shares Voted: 166

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ronald E. Blaylock	Mgmt	Yes	For	For	Against	Against

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.2	Elect Director Albert Bourla	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Mortimer J. Buckley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Susan Desmond-Hellmann	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Joseph J. Echevarria	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.6	Elect Director Scott Gottlieb	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.7	Elect Director Susan Hockfield	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Dan R. Littman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Shantanu Narayen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Suzanne Nora Johnson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director James Quincey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director James C. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.13	Elect Director Cyrus Taraporevala	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.90 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although the company's annual and long-term incentive programs were sufficiently tied to objective performance criteria, the compensation committee modified certain in-cycle LTI awards to provide additional opportunity to earn the awards despite the fact that those awards would likely otherwise not have been earned under their original schedules. In addition, concern is raised regarding the repeated lowering of annual incentive targets that are then achieved above target, as well as failure to disclose the forward-looking target for the FY24 LTI performance award.</i>						

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Pfizer Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Submit Severance Agreement to Shareholder Vote	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company maintains a policy requiring shareholder approval of severance payments that exceed market norms. Further, the company's severance arrangements are reasonable, and there have been no recent severance controversies identified.</i></p>							
5	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this resolution is warranted. The company is considered to provide adequate disclosure related to its anti-discrimination policies.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025		166	166
Total Shares:						166	166

Rambus Inc.

Meeting Date: 04/24/2025	Country: USA	Ticker: RMBS	Proxy Level: 3
Record Date: 02/26/2025	Meeting Type: Annual	Meeting ID: 1937048	
Primary Security ID: 750917106	Primary CUSIP: 750917106	Primary ISIN: US7509171069	Primary SEDOL: 2721967
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 2,958	*Shares on Loan: 0	Shares Instructed: 2,958	Shares Voted: 2,958

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Emiko Higashi	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1b	Elect Director Steven Laub	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
1c	Elect Director Eric Stang	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 03/21/2025	Auto-Approved 03/25/2025	Shares Confirmed 03/26/2025	2,958	2,958
Total Shares:						2,958	2,958

Saia, Inc.

Meeting Date: 04/24/2025	Country: USA	Ticker: SAIA	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1941273	
Primary Security ID: 78709Y105	Primary CUSIP: 78709Y105	Primary ISIN: US78709Y1055	Primary SEDOL: 2982399
Votable Shares: 292	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 292	Shares Voted: 292

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Di-Ann Eisnor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Donna E. Epps	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director John P. Gainor, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Kevin A. Henry	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Frederick J. Holzgrefe, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Donald R. James	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Randolph W. Melville	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Richard D. O'Dell	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Jeffrey C. Ward	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Susan F. Ward	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 03/25/2025	Auto-Approved 03/25/2025		292	292
Total Shares:						292	292

Abbott Laboratories

Meeting Date: 04/25/2025	Country: USA	Ticker: ABT	Proxy Level: 3
Record Date: 02/26/2025	Meeting Type: Annual	Meeting ID: 1940946	
Primary Security ID: 002824100	Primary CUSIP: 002824100	Primary ISIN: US0028241000	Primary SEDOL: 2002305
Votable Shares: 100	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 100	Shares Voted: 100

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert J. Alpern	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Claire Babineaux-Fontenot	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Sally E. Blount	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Robert B. Ford	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Paola Gonzalez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Michelle A. Kumbier	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.7	Elect Director Darren W. McDew	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Abbott Laboratories

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Nancy McKinstry	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Michael G. O'Grady	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Michael F. Roman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Daniel J. Starks	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.12	Elect Director John G. Stratton	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 16.66 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/01/2025	Auto-Approved 04/01/2025		100	100
Total Shares:						100	100

American Electric Power Company, Inc.

Meeting Date: 04/29/2025	Country: USA	Ticker: AEP	Proxy Level: 3
Record Date: 03/04/2025	Meeting Type: Annual	Meeting ID: 1939945	
Primary Security ID: 025537101	Primary CUSIP: 025537101	Primary ISIN: US0255371017	Primary SEDOL: 2026242
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 113	*Shares on Loan: 0	Shares Instructed: 113	Shares Voted: 113

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bill Fehrman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Ben Fowke	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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American Electric Power Company, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Art A. Garcia	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Hunter C. Gary	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Sandra Beach Lin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Henry P. Linginfelter	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Margaret M. McCarthy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Daryl Roberts	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Joseph G. Sauvage	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Daniel G. Stoddard	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Sara Martinez Tucker	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director Lewis Von Thaer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Though there remains some concern about the relative TSR metric merely targeting median performance, pay and performance are reasonably aligned for the year in review, the annual incentive is primarily based on pre-set financial metrics, and the long-term incentive is largely performance conditioned with a multi-year measurement period.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/07/2025	Auto-Approved 04/07/2025		113	113
Total Shares:						113	113

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Meeting Date: 04/29/2025	Country: USA	Ticker: CMA	Proxy Level: 3
Record Date: 02/28/2025	Meeting Type: Annual	Meeting ID: 1941573	
Primary Security ID: 200340107	Primary CUSIP: 200340107	Primary ISIN: US2003401070	Primary SEDOL: 2212870
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 63	*Shares on Loan: 0	Shares Instructed: 63	Shares Voted: 63

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Arthur G. Angulo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Roger A. Cregg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Curtis C. Farmer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director M. Alan Gardner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Derek J. Kerr	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Richard G. Lindner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Jennifer H. Sampson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Barbara R. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Robert S. Taubman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Nina G. Vaca	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Michael G. Van de Ven	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.09 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						

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Comerica Incorporated

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/01/2025	Auto-Approved 04/01/2025		63	63
Total Shares:						63	63

Constellation Energy Corporation

Meeting Date: 04/29/2025	Country: USA	Ticker: CEG	Proxy Level: 3
Record Date: 03/05/2025	Meeting Type: Annual	Meeting ID: 1942490	
Primary Security ID: 21037T109	Primary CUSIP: 21037T109	Primary ISIN: US21037T1097	Primary SEDOL: BMH4FS1
Votable Shares: 53	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 53
	*Shares on Loan: 0	Shares Instructed: 53	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Yves C. de Balmann	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for the incumbent members of the committee responsible for climate risk oversight, Robert Lawless, Yves de Balmann and John Richardson, because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i></p>							
1.2	Elect Director Robert J. Lawless	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for the incumbent members of the committee responsible for climate risk oversight, Robert Lawless, Yves de Balmann and John Richardson, because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i></p>							
1.3	Elect Director Peter Oppenheimer	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.4	Elect Director Eileen Paterson	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.5	Elect Director John M. Richardson	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for the incumbent members of the committee responsible for climate risk oversight, Robert Lawless, Yves de Balmann and John Richardson, because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned for the year in review. Concerns exist with respect to the non-disclosure of forward-looking goals for performance equity awards. However, annual incentives were determined by pre-set objective metrics and equity grants are majority performance-based and measured over a multi-year period.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 9.64 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

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Constellation Energy Corporation

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025	Shares Confirmed 04/08/2025	53	53
Total Shares:						53	53

Exelon Corporation

Meeting Date: 04/29/2025	Country: USA	Ticker: EXC	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1942473	
Primary Security ID: 30161N101	Primary CUSIP: 30161N101	Primary ISIN: US30161N1019	Primary SEDOL: 2670519
Votable Shares: 160	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 160	Shares Voted: 160

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director W. Paul Bowers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Calvin G. Butler, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Marjorie Rodgers Cheshire	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director David DeWalt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Linda Jojo	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Linda Jojo, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i>							
1f	Elect Director Charisse Lillie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Anna Richo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Matthew Rogers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Bryan Segedi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 11.19 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Exelon Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. Although forward-looking goals disclosed are not disclosed under the LTIP, the LTI was predominantly performance-based and the FY24 annual incentive payout was determined entirely by pre-set financial and operational metrics.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/09/2025	Auto-Approved 04/09/2025	Shares Confirmed 04/10/2025	160	160
Total Shares:						160	160

Regal Rexnord Corporation

Meeting Date: 04/29/2025	Country: USA	Ticker: RRX	Proxy Level: 3
Record Date: 03/10/2025	Meeting Type: Annual	Meeting ID: 1942491	
Primary Security ID: 758750103	Primary CUSIP: 758750103	Primary ISIN: US7587501039	Primary SEDOL: 2730082
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 763	*Shares on Loan: 0	Shares Instructed: 763	Shares Voted: 763

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gerben W. Bakker	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Jan A. Bertsch	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Stephen M. Burt	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Theodore D. Crandall	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Michael P. Doss	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Rashida A. Hodge	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1g	Elect Director Michael F. Hilton	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1h	Elect Director Louis V. Pinkham	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Regal Rexnord Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Rakesh Sachdev	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Curtis W. Stoelting	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Robin A. Walker-Lee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 24.64 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025	Shares Confirmed 04/04/2025	763	763
Total Shares:						763	763

The GEO Group, Inc.

Meeting Date: 04/29/2025	Country: USA	Ticker: GEO	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1942943	
Primary Security ID: 36162J106	Primary CUSIP: 36162J106	Primary ISIN: US36162J1060	Primary SEDOL: BNLVWQ1
Votable Shares: 517	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 517	Shares Voted: 517

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas C. Bartzokis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Jack Brewer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Donna Arduin Kauranen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Scott M. Kernan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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The GEO Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Lindsay L. Koren	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Julie Myers Wood	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director George C. Zoley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.71 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025	Shares Confirmed 04/11/2025	517	517
Total Shares:						517	517

Truist Financial Corporation

Meeting Date: 04/29/2025	Country: USA	Ticker: TFC	Proxy Level: 3
Record Date: 02/20/2025	Meeting Type: Annual	Meeting ID: 1941256	
Primary Security ID: 89832Q109	Primary CUSIP: 89832Q109	Primary ISIN: US89832Q1094	Primary SEDOL: BKP7287
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 224	*Shares on Loan: 0	Shares Instructed: 224	Shares Voted: 224

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jennifer S. Banner	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1b	Elect Director K. David Boyer, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Agnes Bundy Scanlan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Truist Financial Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Dallas S. Clement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Linnie M. Haynesworth	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Donna S. Morea	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Charles A. Patton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director William H. Rogers, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Thomas E. Skains	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Laurence Stein	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Bruce L. Tanner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Steven C. Voorhees	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.42 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. For FY24, the committee transitioned from a largely formulaic program primarily based on two financial metrics with weightings and robust goal disclosure to a scorecard which ultimately appears discretionary. The new structure is significantly more complex than the prior program and lacks several key disclosures, including individual metric (and category) weightings, and quantified threshold and maximum goals. Annual equity awards are majority based on multi-year performance goals. However, the proxy does not disclose the forward-looking target goal for the absolute metric and the relative metric targets merely median performance. Lastly, the company granted off-cycle awards to two NEOs which, although entirely based on relative TSR, effectively provide for guaranteed vesting at the threshold level.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/09/2025	Auto-Approved 04/09/2025	Shares Confirmed 04/10/2025	224	224
Total Shares:						224	224

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Wells Fargo & Company

Meeting Date: 04/29/2025	Country: USA	Ticker: WFC	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1942493	
Primary Security ID: 949746101	Primary CUSIP: 949746101	Primary ISIN: US9497461015	Primary SEDOL: 2649100

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 115	*Shares on Loan: 0
	Shares Instructed: 115
	Shares Voted: 115

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Steven D. Black	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Mark A. Chancy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Celeste A. Clark	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1d	Elect Director Theodore F. Craver, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Richard K. Davis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Fabian T. Garcia	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Wayne M. Hewett	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director CeCelia G. Morken	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Maria R. Morris	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Felicia F. Norwood	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Ronald L. Sargent	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1l	Elect Director Charles W. Scharf	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Suzanne M. Vautrinot	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						

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Wells Fargo & Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. There are continuing concerns regarding the discretionary nature of incentive award determinations and the lack of key disclosures in the pay programs. Furthermore, the relative metric in the LTI program targets merely median performance. However, these issues have not contributed to a quantitative pay-for-performance misalignment and additional sufficient mitigating factors have been identified. Financial and non-financial metrics considered were generally consistent with the prior year and a majority of annual equity awards were based on clearly disclosed multi-year performance goals. In addition, the target goal for the absolute metric in the LTI program was increased year-over-year. A quantitative pay-for-performance misalignment going forward may be met with increased scrutiny of pay program structure and disclosures.</i></p>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.69 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Report on Prevention of Workplace Harassment and Discrimination	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this resolution is warranted, as the increased transparency would help shareholders assess how the company is managing associated risks and current practices.</i></p>							
5	Report on Congruency of Political Spending with Company Values and Priorities	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as a report on the company's congruence of political expenditures with stated values would enable shareholders to have a more comprehensive understanding of how the company oversees and manages risks related to its political partnerships.</i></p>							
6	Report Annually on Energy Supply Ratio	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as it would help shareholders better evaluate the company's management of climate risks from its lending and underwriting activities.</i></p>							
7	Report on Respecting Indigenous Peoples' Rights	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. The bank and its shareholders are likely to benefit from increased transparency regarding due diligence around indigenous peoples' rights in project-related financing and clients' activities, for existing and future business.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/11/2025	Auto-Approved 04/11/2025	Shares Confirmed 04/15/2025	115	115
Total Shares:						115	115

Cognex Corporation

Meeting Date: 04/30/2025	Country: USA	Ticker: CGNX	Proxy Level: 3
Record Date: 02/28/2025	Meeting Type: Annual	Meeting ID: 1940681	
Primary Security ID: 192422103	Primary CUSIP: 192422103	Primary ISIN: US1924221039	Primary SEDOL: 2208288

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Cognex Corporation

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 2,547

***Shares on Loan:** 0

Shares Instructed: 2,547

Shares Voted: 2,547

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John T.C. Lee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Anthony Sun	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Robert J. Willett	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; and - High CEO pay relative to company performance compared to the company's peers.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/01/2025	Auto-Approved 04/01/2025		2,547	2,547
Total Shares:						2,547	2,547

Corteva, Inc.

Meeting Date: 04/30/2025

Country: USA

Ticker: CTVA

Proxy Level: 3

Record Date: 03/05/2025

Meeting Type: Annual

Meeting ID: 1943661

Primary Security ID: 22052L104

Primary CUSIP: 22052L104

Primary ISIN: US22052L1044

Primary SEDOL: BK73B42

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 57

***Shares on Loan:** 0

Shares Instructed: 57

Shares Voted: 57

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lamberto Andreotti	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Klaus A. Engel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director David C. Everitt	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Janet P. Giesselman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Karen H. Grimes	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Michael O. Johanns	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Marcos M. Lutz	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Charles V. Magro	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Nayaki R. Nayyar	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Gregory R. Page	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Kerry J. Preete	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Patrick J. Ward	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Although forward-looking goals are not disclosed for performance conditioned LTI awards, a majority of the long-term incentives are performance conditioned and utilize a multi-year performance period. In addition, annual incentives are based largely on pre-set financial metrics.</i>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 11.66 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/07/2025	Auto-Approved 04/07/2025	Shares Confirmed 04/09/2025	57	57
Total Shares:						57	57

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Marathon Petroleum Corporation

Meeting Date: 04/30/2025	Country: USA	Ticker: MPC	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1941625	
Primary Security ID: 56585A102	Primary CUSIP: 56585A102	Primary ISIN: US56585A1025	Primary SEDOL: B3K3L40
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 130	*Shares on Loan: 0	Shares Instructed: 130	Shares Voted: 130

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Evan Bayh	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, B. Evan Bayh III, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director Jeffrey C. Campbell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Kimberly N. Ellison-Taylor	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Kim K.W. Rucker	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance were reasonably aligned for the year in review.</i>						
4	Declassify the Board of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as a declassified board would improve director accountability to shareholders.</i>						
5	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as eliminating the various supermajority vote requirements would improve shareholder rights.</i>						
6	Adopt Simple Majority Vote	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as reducing vote requirements would improve shareholder rights. In addition, approval of this non-binding item may convey to the board that shareholders may wish for it to take additional steps to ensure the proposal topic is implemented.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/15/2025	Auto-Approved 04/15/2025	Shares Confirmed 04/16/2025	130	130
Total Shares:						130	130

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Meeting Date: 04/30/2025	Country: USA	Ticker: NEM	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1940945	
Primary Security ID: 651639106	Primary CUSIP: 651639106	Primary ISIN: US6516391066	Primary SEDOL: 2636607
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 145	*Shares on Loan: 0	Shares Instructed: 145	Shares Voted: 145

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Gregory H. Boyce	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Bruce R. Brook	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Maura J. Clark	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Harry M. (Red) Conger, IV	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Emma FitzGerald	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Sally-Anne Layman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director José Manuel Madero	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director René Médori	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Jane Nelson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Tom Palmer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Julio M. Quintana	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director David T. Seaton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. Further, annual incentives are entirely based on corporate goals and long-term incentives are majority performance-conditioned with multi-year measurement periods, with forward-looking goals disclosed.</i>						

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Newmont Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because only 3.43 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025		145	145
Total Shares:						145	145

Halozyne Therapeutics, Inc.

Meeting Date: 05/01/2025	Country: USA	Ticker: HALO	Proxy Level: 3
Record Date: 03/04/2025	Meeting Type: Annual	Meeting ID: 1942037	
Primary Security ID: 40637H109	Primary CUSIP: 40637H109	Primary ISIN: US40637H1095	Primary SEDOL: 2975098
Votable Shares: 2,241	Total Ballots: 1 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 2,241	Shares Voted: 2,241

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Jeffrey W. Henderson	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1B	Elect Director Helen I. Torley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/01/2025	Auto-Approved 04/01/2025	Shares Confirmed 04/08/2025	2,241	2,241
Total Shares:						2,241	2,241

**Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.*

Inspire Medical Systems, Inc.

Meeting Date: 05/01/2025	Country: USA	Ticker: INSP	Proxy Level: 3
Record Date: 03/04/2025	Meeting Type: Annual	Meeting ID: 1942038	
Primary Security ID: 457730109	Primary CUSIP: 457730109	Primary ISIN: US4577301090	Primary SEDOL: BDT5KT5
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 538	*Shares on Loan: 0	Shares Instructed: 538	Shares Voted: 538

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cynthia B. Burks	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Timothy Herbert, Cynthia Burks, and Shawn McCormick given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1.2	Elect Director Timothy P. Herbert	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Timothy Herbert, Cynthia Burks, and Shawn McCormick given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1.3	Elect Director Shawn T McCormick	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Timothy Herbert, Cynthia Burks, and Shawn McCormick given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.18 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025		538	538
Total Shares:						538	538

Lantheus Holdings, Inc.

Meeting Date: 05/01/2025	Country: USA	Ticker: LNTH	Proxy Level: 3
Record Date: 03/03/2025	Meeting Type: Annual	Meeting ID: 1943663	
Primary Security ID: 516544103	Primary CUSIP: 516544103	Primary ISIN: US5165441032	Primary SEDOL: BP8S8J5

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Lantheus Holdings, Inc.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 909

***Shares on Loan:** 0

Shares Instructed: 909

Shares Voted: 909

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mary Anne Heino	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Gérard Ber	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Julie Eastland	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.4	Elect Director Samuel Leno	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: As the Governance Committee chair is not on the ballot, a vote AGAINST Governance Committee member Samuel Leno is warranted given the board's failure to remove, or subject to a sunset requirement, the classified board structure which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Declassify the Board of Directors	SH	Yes	None	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted because the declassification would enhance board accountability.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/03/2025		909	909
Total Shares:						909	909

NRG Energy, Inc.

Meeting Date: 05/01/2025

Country: USA

Ticker: NRG

Proxy Level: 3

Record Date: 03/03/2025

Meeting Type: Annual

Meeting ID: 1942486

Primary Security ID: 629377508

Primary CUSIP: 629377508

Primary ISIN: US6293775085

Primary SEDOL: 2212922

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 90

***Shares on Loan:** 0

Shares Instructed: 90

Shares Voted: 90

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director E. Spencer Abraham	Mgmt	Yes	For	For	Against	Against

**Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.*

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director Antonio Carrillo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Matthew Carter, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Lawrence S. Coben	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Heather Cox	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Heather Cox, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>						
1f	Elect Director Elisabeth B. Donohue	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Marwan Fawaz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Kevin T. Howell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Alexander Pourbaix	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Alexandra Pruner	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1k	Elect Director Marcie C. Zlotnik	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. The annual incentives were predominantly based on pre-set objective financial metrics, and the CEO's equity awards were entirely performance based, with performance measured over a multi-year performance period.</i>						
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.94 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Eliminate Supermajority Vote Requirements and Eliminate Related Obsolete References	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The reduction in the supermajority vote requirement would enhance shareholder rights. In addition, the other amendments are considered to be administrative or made to comply with Delaware law and would not negatively impact shareholders' rights.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

NRG Energy, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/09/2025	Auto-Approved 04/10/2025	Shares Confirmed 04/11/2025	90	90
Total Shares:						90	90

Biohaven Ltd.

Meeting Date: 05/05/2025 **Country:** Virgin Isl (UK) **Ticker:** BHAVN **Proxy Level:** N/A
Record Date: 03/10/2025 **Meeting Type:** Annual **Meeting ID:** 1942052
Primary Security ID: G1110E107 **Primary CUSIP:** G1110E107 **Primary ISIN:** VGG1110E1079 **Primary SEDOL:** BPLZ755

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 2,024 ***Shares on Loan:** 0 **Shares Instructed:** 2,024 **Shares Voted:** 2,024

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vlad Coric	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for director nominees Vladimir (Vlad) Coric and Kishan (Kishen) Mehta given the board's failure to remove, or subject to a sunset requirement, the classified board structure which adversely impacts shareholder rights.</i>							
1b	Elect Director Kishan Mehta	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for director nominees Vladimir (Vlad) Coric and Kishan (Kishen) Mehta given the board's failure to remove, or subject to a sunset requirement, the classified board structure which adversely impacts shareholder rights.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - Modified single-trigger provision in change-in-control agreements.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/08/2025	Auto-Approved 04/08/2025	Shares Confirmed 04/09/2025	2,024	2,024
Total Shares:						2,024	2,024

Uber Technologies, Inc.

Meeting Date: 05/05/2025 **Country:** USA **Ticker:** UBER **Proxy Level:** 3
Record Date: 03/13/2025 **Meeting Type:** Annual **Meeting ID:** 1944387
Primary Security ID: 90353T100 **Primary CUSIP:** 90353T100 **Primary ISIN:** US90353T1007 **Primary SEDOL:** BK6N347

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 569

*Shares on Loan: 0

Shares Instructed: 569

Shares Voted: 569

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ronald Sugar	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: Significant risks to shareholders stemming from severe ESG controversies have been identified at the company, which reflects a failure by the board to proficiently guard against and manage material environmental, social and governance risks. Votes AGAINST board chair Ronald (Ron) Sugar are warranted given that the chair of the board ultimately shoulders the most responsibility amongst all board members for failing to effectively supervise the management of risks to the company and its shareholders, and should therefore be held the most accountable for poor board oversight of ESG risk exposures at the firm.</i></p>							
1b	Elect Director Revathi Advaiti	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Turqi Alnowaiser	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1d	Elect Director Ursula Burns	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Robert Eckert	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1f	Elect Director Amanda Ginsberg	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1g	Elect Director Dara Khosrowshahi	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1h	Elect Director John Thain	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1i	Elect Director David Trujillo	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1j	Elect Director Alexander Wynaendts	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.66 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/09/2025	Auto-Approved 04/10/2025	Shares Confirmed 04/11/2025	569	569

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Bristol-Myers Squibb Company

Meeting Date: 05/06/2025 Country: USA Ticker: BMY Proxy Level: 3
 Record Date: 03/14/2025 Meeting Type: Annual Meeting ID: 1945691
 Primary Security ID: 110122108 Primary CUSIP: 110122108 Primary ISIN: US1101221083 Primary SEDOL: 2126335

Total Ballots: 1 Voting Policy: UUA
 Votable Shares: 124 *Shares on Loan: 0 Shares Instructed: 124 Shares Voted: 124

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Peter J. Arduini	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1B	Elect Director Deepak L. Bhatt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1C	Elect Director Christopher S. Boerner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1D	Elect Director Julia A. Haller	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1E	Elect Director Manuel Hidalgo Medina	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1F	Elect Director Michael R. McMullen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1G	Elect Director Paula A. Price	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1H	Elect Director Derica W. Rice	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1I	Elect Director Theodore R. Samuels	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1J	Elect Director Karen H. Vousden	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1K	Elect Director Phyllis R. Yale	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned for the year in review. Although there are concerns regarding the structure and goal disclosure for the PSUs, the LTI program is entirely performance-contingent and based on the achievement of multi-year goals.</i>						

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Bristol-Myers Squibb Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.14 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Establish a Board Committee on Corporate Financial Sustainability	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Absent clear governance failures, the board is generally given latitude to determine its committee structure.</i>							
5	Consider Abolishing DEI Goals	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company provides several disclosures that relate to diversity and inclusion, and these disclosures appear to provide sufficient information for shareholders to evaluate the programs and policies in question. In addition, there do not appear to be any controversies related to employee diversity initiatives discriminating against employee groups at the company specifically.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/15/2025	124	124
Total Shares:						124	124

Cboe Global Markets, Inc.

Meeting Date: 05/06/2025	Country: USA	Ticker: CBOE	Proxy Level: 3
Record Date: 03/18/2025	Meeting Type: Annual	Meeting ID: 1950060	
Primary Security ID: 12503M108	Primary CUSIP: 12503M108	Primary ISIN: US12503M1080	Primary SEDOL: B5834C5
Votable Shares: 93	Total Ballots: 1 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 93	Shares Voted: 93

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William M. Farrow, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Fredric J. Tomczyk	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Edward J. Fitzpatrick	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Ivan K. Fong	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Janet P. Froetscher	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Jill R. Goodman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Erin A. Mansfield	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Cecilia H. Mao	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Alexander J. Maturri, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Jennifer J. McPeck	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Roderick A. Palmore	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director James E. Parisi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. There is some concern surrounding performance equity goal rigor and off-cycle equity grant practices. However, annual incentives are predominantly based on pre-set financial metrics, and half of annual equity grants awarded to non-CEO NEOs are based on clearly disclosed multi-year goals.</i>						
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.99 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
5	Report on Political Contributions	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The company does not provide sufficient information regarding its political contribution activities or the financial support it may provide to trade associations that may be used for indirect political contributions.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/18/2025	Auto-Approved 04/18/2025	Shares Confirmed 04/19/2025	93	93
Total Shares:						93	93

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Meeting Date: 05/06/2025	Country: USA	Ticker: PLNT	Proxy Level: 3
Record Date: 03/10/2025	Meeting Type: Annual	Meeting ID: 1945701	
Primary Security ID: 72703H101	Primary CUSIP: 72703H101	Primary ISIN: US72703H1014	Primary SEDOL: BYSFJV8
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,589	*Shares on Loan: 0	Shares Instructed: 1,589	Shares Voted: 1,589

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Craig Benson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Cammie Dunaway	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Cambria (Cammie) Dunaway given the board's failure to remove, or subject to a sunset requirement, the classified board structure, which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>						
1.3	Elect Director Christopher Tanco	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.37 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive; - The estimated duration of available and proposed shares exceeds six years; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); and - The plan allows broad discretion to accelerate vesting.</i>						
5	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i>						
6	Amend Charter to Remove Obsolete Provisions	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the removal of obsolete provisions is viewed as administrative and would not impact shareholder rights.</i>						
7	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>						
8	Report on Effectiveness of Diversity, Equity, and Inclusion Efforts	SH	Yes	None	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted, as additional diversity-related disclosure would allow shareholders to better assess the effectiveness of the company's diversity initiatives and its management of related risks.</i>						

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Planet Fitness, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/16/2025	1,589	1,589
Total Shares:						1,589	1,589

Valero Energy Corporation

Meeting Date: 05/06/2025 **Country:** USA **Ticker:** VLO **Proxy Level:** 3
Record Date: 03/10/2025 **Meeting Type:** Annual **Meeting ID:** 1942030
Primary Security ID: 91913Y100 **Primary CUSIP:** 91913Y100 **Primary ISIN:** US91913Y1001 **Primary SEDOL:** 2041364

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 130 ***Shares on Loan:** 0 **Shares Instructed:** 130 **Shares Voted:** 130

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Fred M. Diaz	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director H. Paulett Eberhart	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Marie A. Ffolkes	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Kimberly S. Greene	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Deborah P. Majoras	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Deborah Majoras, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>							
1f	Elect Director Eric D. Mullins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director R. Lane Riggs	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Randall J. Weisenburger	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1i	Elect Director Rayford Wilkins, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Valero Energy Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. A majority of annual incentives and half of long-term incentives are based on pre-set objective targets. However, significant concerns are raised by a recent pay decision. In February 2025, the committee changed in-flight equity awards, including removing a vesting cap feature for negative absolute TSR. The cap was recently added in response to shareholder feedback after receiving low say-on-pay support. Although the company has disclosed in a supplemental filing the rationale for this decision, it is nonetheless considered problematic action.</i></p>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.10 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/22/2025	Auto-Approved 04/22/2025	Shares Confirmed 04/24/2025	130	130
Total Shares:						130	130

CSX Corporation

Meeting Date: 05/07/2025	Country: USA	Ticker: CSX	Proxy Level: 3
Record Date: 03/07/2025	Meeting Type: Annual	Meeting ID: 1944986	
Primary Security ID: 126408103	Primary CUSIP: 126408103	Primary ISIN: US1264081035	Primary SEDOL: 2160753
Votable Shares: 165	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 165
	*Shares on Loan: 0	Shares Instructed: 165	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ann D. Begeman	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Thomas P. Bostick	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1c	Elect Director Anne H. Chow	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1d	Elect Director Steven T. Halverson	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Paul C. Hilal	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Joseph R. Hinrichs	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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CSX Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director David M. Moffett	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Linda H. Riefler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Suzanne M. Vautrinot	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director James L. Wainscott	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director J. Steven Whisler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director John J. Zillmer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. As in prior years, the LTI's forward-looking performance targets are not disclosed. The prior-cycle LTI plan allowed payouts for negative growth rate, which may raise shareholder concern regarding the plan's rigor. However, CEO pay and company performance are reasonably aligned for the year in review. The STI plan is conditioned on clearly disclosed objective performance metrics and a majority of the CEO's long-term equity grants are conditioned on multi-year performance goals. The board approved a one-time adjustment which improved payouts but the rationale appears reasonable. The clawback policy was implemented in presence of a restatement.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/15/2025	165	165
Total Shares:						165	165

CME Group Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: CME	Proxy Level: 3
Record Date: 03/10/2025	Meeting Type: Annual	Meeting ID: 1942916	
Primary Security ID: 12572Q105	Primary CUSIP: 12572Q105	Primary ISIN: US12572Q1058	Primary SEDOL: 2965839

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 67

*Shares on Loan: 0

Shares Instructed: 67

Shares Voted: 67

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Terrence A. Duffy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Kathryn Benesh	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Timothy S. Bitsberger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Charles P. Carey	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Bryan T. Durkin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Harold Ford, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Martin J. Gepsman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Daniel G. Kaye	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Phyllis M. Lockett	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST governance committee chair Phyllis Lockett is warranted given the problematic capital structure that negatively impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
1j	Elect Director Deborah J. Lucas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Rahael Seifu	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director William R. Shepard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1m	Elect Director Howard J. Siegel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1n	Elect Director Dennis A. Suskind	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

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CME Group Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against

Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	67	67
Total Shares:						67	67

Ford Motor Company

Meeting Date: 05/08/2025	Country: USA	Ticker: F	Proxy Level: 4
Record Date: 03/12/2025	Meeting Type: Annual	Meeting ID: 1946831	
Primary Security ID: 345370860	Primary CUSIP: 345370860	Primary ISIN: US3453708600	Primary SEDOL: 2615468
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 400	*Shares on Loan: 0	Shares Instructed: 400	Shares Voted: 400

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kimberly A. Casiano	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Adriana Cisneros	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Alexandra Ford English	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director James D. Farley, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Henry Ford, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director William Clay Ford, Jr.	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: - A vote AGAINST Chairman William Ford Jr. and Nominating and Governance Committee Chair William Kennard is warranted, because the company maintains a dual-class capital structure with unequal voting rights and it is not subject to a time-based sunset.</i>							
1g	Elect Director William W. Helman, IV	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Jon M. Huntsman, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director William E. Kennard	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: - A vote AGAINST Chairman William Ford Jr. and Nominating and Governance Committee Chair William Kennard is warranted, because the company maintains a dual-class capital structure with unequal voting rights and it is not subject to a time-based sunset.</i>						
1j	Elect Director John C. May	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Beth E. Mooney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Lynn Vojvodich Radakovich	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director John L. Thornton	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1n	Elect Director John B. Veihmeyer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1o	Elect Director John S. Weinberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.62 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as pay and performance are reasonably aligned at this time. Annual incentives are based primarily on disclosed financial and operational metrics, and a majority of the CEO's equity awards are performance-based, with performance measured over a multi-year period.</i>						
4	Approve Tax Benefits Preservation Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR the renewal of the NOL poison pill is warranted given the substantial size of the company's deferred tax assets related to net operating losses, the high likelihood of their realization, and the reasonable three-year term of the NOL pill that mitigates some of the governance risk the pill will pose.</i>						
5	Report on Efforts to Reduce GHG Emissions in Alignment with Net Zero Goals	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional information on the company's efforts to include all its material Scope 3 emissions into its net zero by 2050 goals would help investors better understand how the company is managing to reduce its full value chain emissions and mitigate climate change-related risks.</i>						
6	Disclose Research on DEI Strategy - Withdrawn Proposal	SH	No				

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Ford Motor Company

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	400	400
Total Shares:						400	400

Sterling Infrastructure, Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: STRL	Proxy Level: 3
Record Date: 03/11/2025	Meeting Type: Annual	Meeting ID: 1945015	
Primary Security ID: 859241101	Primary CUSIP: 859241101	Primary ISIN: US8592411016	Primary SEDOL: 2632876

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 767	Shares Instructed: 767
*Shares on Loan: 0	Shares Voted: 767

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William T. Bosway	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Roger A. Cregg	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Joseph A. Cutillo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Julie A. Dill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Dana C. O'Brien	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Dwayne A. Wilson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/08/2025	Auto-Approved 04/08/2025	Shares Confirmed 04/09/2025	767	767

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T. Rowe Price Group, Inc.

Meeting Date: 05/08/2025 Country: USA Ticker: TROW Proxy Level: 3
Record Date: 03/03/2025 Meeting Type: Annual Meeting ID: 1945309
Primary Security ID: 74144T108 Primary CUSIP: 74144T108 Primary ISIN: US74144T1088 Primary SEDOL: 2702337

Total Ballots: 1 Voting Policy: UUA
Votable Shares: 55 *Shares on Loan: 0 Shares Instructed: 55 Shares Voted: 55

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Glenn R. August	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Mark S. Bartlett	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director William P. Donnelly	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Dina Dublon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Robert F. MacLellan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Eileen P. Rominger	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Robert W. Sharps	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Cynthia F. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Robert J. Stevens	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Sandra S. Wijnberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Alan D. Wilson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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T. Rowe Price Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. The company adopted a more structured and less discretionary approach to determining incentive compensation for the CEO, and now discloses performance metrics, targets and weightings. A majority of cash and equity incentives are awarded based on financial measures, and half of equity awards vest based on an additional performance metric, measured over a multi-year period.</i></p>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.43 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Submit Severance Agreement to Shareholder Vote	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although current severance arrangements do not raise any concerns, the company does not disclose a policy prohibiting additional cash severance payments beyond a certain level or a mechanism that would require shareholder approval in order for excessive cash severance to be payable. The requested policy would ensure such shareholder protections.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025		55	55
Total Shares:						55	55

Union Pacific Corporation

Meeting Date: 05/08/2025	Country: USA	Ticker: UNP	Proxy Level: 3
Record Date: 03/14/2025	Meeting Type: Annual	Meeting ID: 1945016	
Primary Security ID: 907818108	Primary CUSIP: 907818108	Primary ISIN: US9078181081	Primary SEDOL: 2914734
Votable Shares: 25	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 25	Shares Voted: 25

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David B. Dillon	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Sheri H. Edison	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Teresa M. Finley	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Deborah C. Hopkins	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Jane H. Lute	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							

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Union Pacific Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Michael R. McCarthy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Doyle R. Simons	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director John K. Tien, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director V. James Vena	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director John P. Wiehoff	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Christopher J. Williams	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.80 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance were reasonably aligned for the year in review.</i>							
4	Amend Clawback Policy	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company's existing clawback policies appear to cover the standard that is requested by the proponent. Further, the proponent's ask that the board disclose any deliberations related to the policy, even when recoupment of pay is not sought, is considered overly prescriptive.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	25	25
Total Shares:						25	25

WEC Energy Group, Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: WEC	Proxy Level: 3
Record Date: 03/07/2025	Meeting Type: Annual	Meeting ID: 1946091	
Primary Security ID: 92939U106	Primary CUSIP: 92939U106	Primary ISIN: US92939U1060	Primary SEDOL: BYY8XK8

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 100

*Shares on Loan: 0

Shares Instructed: 100

Shares Voted: 100

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Warner L. Baxter	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Ave M. Bie	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Danny L. Cunningham	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Danny Cunningham, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>						
1.4	Elect Director William M. Farrow, III	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Cristina A. Garcia-Thomas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Maria C. Green	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Gale E. Klappa	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Thomas K. Lane	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director John D. Lange	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Scott J. Lauber	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Ulice Payne, Jr.	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.12	Elect Director Mary Ellen Stanek	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.13	Elect Director Glen E. Tellock	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.63 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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WEC Energy Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although concerns are noted about the discretionary bonus paid to one of the NEOs and the rigor of the LTIP relative TSR metric, the short- and long- term incentives are predominantly based on pre-set financial metrics, and the equity awards utilize multi-year performance periods.</i></p>							
4	Eliminate Supermajority Vote Requirement to Amend Articles of Incorporation	Mgmt	Yes	For	For	For	For
5	Eliminate Supermajority Vote Requirement to Amend Bylaws	Mgmt	Yes	For	For	For	For
6	Adopt Simple Majority Vote	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted given that elimination of the supermajority vote requirements would enhance shareholder rights, and support for this proposal would signal to the board that it should continue to make efforts to reduce the supermajority requirements if this year's attempts fall short.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025		100	100
Total Shares:						100	100

AbbVie Inc.

Meeting Date: 05/09/2025	Country: USA	Ticker: ABBV	Proxy Level: 3
Record Date: 03/10/2025	Meeting Type: Annual	Meeting ID: 1944389	
Primary Security ID: 00287Y109	Primary CUSIP: 00287Y109	Primary ISIN: US00287Y1091	Primary SEDOL: B92SR70
Votable Shares: 100	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 100
	*Shares on Loan: 0	Shares Instructed: 100	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William H.L. Burnside	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Thomas C. Freyman	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Brett J. Hart	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Edward J. Rapp	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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AbbVie Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 16.47 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although concerns regarding the structure of the short-term and long-term incentive programs remain, pay and performance are reasonably aligned at this time.</i>							
4	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement enhances shareholder rights.</i>							
5	Adopt Simple Majority Vote	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The elimination of supermajority vote requirements would improve shareholder rights and approval of this non-binding item may convey to the board that shareholders may wish for it to take additional steps to ensure they are removed.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/03/2025	Auto-Approved 04/08/2025	Shares Confirmed 04/10/2025	100	100
Total Shares:						100	100

Marriott International, Inc.

Meeting Date: 05/09/2025	Country: USA	Ticker: MAR	Proxy Level: 3
Record Date: 03/12/2025	Meeting Type: Annual	Meeting ID: 1946210	
Primary Security ID: 571903202	Primary CUSIP: 571903202	Primary ISIN: US5719032022	Primary SEDOL: 2210614
Votable Shares: 48	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 48	Shares Voted: 48

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony G. Capuano	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Isabella D. Goren	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Deborah Marriott Harrison	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Frederick A. Henderson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Marriott International, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Lauren R. Hobart	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Debra L. Lee	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director Aylwin B. Lewis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director David S. Marriott	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Margaret M. McCarthy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Grant F. Reid	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Horacio D. Rozanski	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Susan C. Schwab	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1m	Elect Director Sean C. Tresvant	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. After a review of the company's compensation program and practices, it is determined that pay and performance are reasonably aligned at this time. That being said, there are concerns regarding goal disclosure with respect to the non-financial goals in the STI and the lack of forward-looking goals disclosed for the PSUs. Nevertheless, the short-term incentive was primarily based on a financial metric and the long-term incentive is targeted to be half performance based with a multi-year measurement period.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025	Shares Confirmed 04/24/2025	48	48
Total Shares:						48	48

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The Chefs' Warehouse, Inc.

Meeting Date: 05/09/2025	Country: USA	Ticker: CHEF	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1945711	
Primary Security ID: 163086101	Primary CUSIP: 163086101	Primary ISIN: US1630861011	Primary SEDOL: B63RTD5
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 3,487	*Shares on Loan: 0	Shares Instructed: 3,487	Shares Voted: 3,487

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ivy Brown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Steven F. Goldstone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Aylwin Lewis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Lester Owens	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Christopher Pappas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director John Pappas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Richard N. Peretz	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: The nominee attended less than 75% of the board and committee meetings.</i>						
1h	Elect Director Debra Walton-Ruskin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Wendy M. Weinstein	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify BDO USA, P.C. as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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The Chefs' Warehouse, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/22/2025	3,487	3,487
Total Shares:						3,487	3,487

AAON, Inc.

Meeting Date: 05/13/2025 **Country:** USA **Ticker:** AAON **Proxy Level:** 3
Record Date: 03/14/2025 **Meeting Type:** Annual **Meeting ID:** 1949611
Primary Security ID: 000360206 **Primary CUSIP:** 000360206 **Primary ISIN:** US0003602069 **Primary SEDOL:** 2268130

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 1,665 ***Shares on Loan:** 0 **Shares Instructed:** 1,665 **Shares Voted:** 1,665

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director A.H. ("Chip") McElroy, II	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Bruce Ware	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/25/2025	1,665	1,665
Total Shares:						1,665	1,665

Knight-Swift Transportation Holdings Inc.

Meeting Date: 05/13/2025 **Country:** USA **Ticker:** KNX **Proxy Level:** 3
Record Date: 03/17/2025 **Meeting Type:** Annual **Meeting ID:** 1950237
Primary Security ID: 499049104 **Primary CUSIP:** 499049104 **Primary ISIN:** US4990491049 **Primary SEDOL:** BF0LKDO

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Knight-Swift Transportation Holdings Inc.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 2,669

*Shares on Loan: 0

Shares Instructed: 2,669

Shares Voted: 2,669

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Amy Boerger	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Douglas Col	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Reid Dove	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Michael Garnreiter	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Louis Hobson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Gary Knight	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Kevin Knight	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Adam Miller	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Kathryn Munro	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Jessica Powell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Roberta Roberts Shank	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director David Vander Ploeg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Report on Political Contributions	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The company does not provide sufficient information regarding the financial support it may provide to trade associations that may be used for indirect political contributions.</i>						

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Knight-Swift Transportation Holdings Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/24/2025	Auto-Approved 04/24/2025	Shares Confirmed 04/25/2025	2,669	2,669
Total Shares:						2,669	2,669

SPS Commerce, Inc.

Meeting Date: 05/13/2025	Country: USA	Ticker: SPSC	Proxy Level: 3
Record Date: 03/19/2025	Meeting Type: Annual	Meeting ID: 1947033	
Primary Security ID: 78463M107	Primary CUSIP: 78463M107	Primary ISIN: US78463M1071	Primary SEDOL: B57VWJ3

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 911	Shares Instructed: 911
*Shares on Loan: 0	Shares Voted: 911

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Chad Collins	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Razat Gaurav	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Marty Réaume	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Tami Reller	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Philip Soran	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Anne Sempowski Ward	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Sven Wehrwein	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/16/2025	911	911
Total Shares:						911	911

American International Group, Inc.

Meeting Date: 05/14/2025	Country: USA	Ticker: AIG	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1949663	
Primary Security ID: 026874784	Primary CUSIP: 026874784	Primary ISIN: US0268747849	Primary SEDOL: 2027342
Votable Shares: 85	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 85
	*Shares on Loan: 0	Shares Instructed: 85	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paola Bergamaschi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director James Cole, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director James (Jimmy) Dunne, III	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST compensation committee members Linda Mills, Diana Murphy, and James (Jimmy) Dunne III is warranted, in light of the committee's poor responsiveness to last year's low say-on-pay vote result. A vote FOR the remaining director nominees is warranted.</i>							
1d	Elect Director John (Chris) Inglis	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Courtney Leimkuhler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Linda A. Mills	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST compensation committee members Linda Mills, Diana Murphy, and James (Jimmy) Dunne III is warranted, in light of the committee's poor responsiveness to last year's low say-on-pay vote result. A vote FOR the remaining director nominees is warranted.</i>							
1g	Elect Director Diana M. Murphy	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. A vote AGAINST compensation committee members Linda Mills, Diana Murphy, and James (Jimmy) Dunne III is warranted, in light of the committee's poor responsiveness to last year's low say-on-pay vote result. A vote FOR the remaining director nominees is warranted.</i>							
1h	Elect Director Juan Perez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Peter R. Porrino	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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American International Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director John G. Rice	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Vanessa A. Wittman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Peter Zaffino	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - High CEO pay relative to company performance compared to the company's peers; - High CEO pay in relation to company peer group CEO median pay levels. The committee engaged with shareholders following last year's low say-on-pay vote result. However, the feedback disclosure does not clearly indicate shareholders' concerns that led to the low vote result and the company's disclosed responses to the feedback do not represent any new meaningful changes or commitments. Accordingly, the committee has demonstrated poor responsiveness. Moreover, an unmitigated pay-for-performance misalignment exists for the year in review. The STI program is less complex in 2024, which is positive. However, several STI financial metrics were set at a less challenging level compared to the prior year's results and the program is heavily reliant on individual performance determinations. These STI concerns are exacerbated given the CEO's maximum payout. Further, while the CEO's LTI awards are majority performance-conditioned, the proxy does not disclose forward-looking PSU goals. Closing-cycle disclosure also indicates some goal rigor concerns with the relative TSR metric, for which the weighting has recently increased.</i>							
3	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025	Shares Confirmed 04/24/2025	85	85
Total Shares:						85	85

Avient Corporation

Meeting Date: 05/14/2025	Country: USA	Ticker: AVNT	Proxy Level: 3
Record Date: 03/18/2025	Meeting Type: Annual	Meeting ID: 1946159	
Primary Security ID: 05368V106	Primary CUSIP: 05368V106	Primary ISIN: US05368V1061	Primary SEDOL: BMHWY55

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 3,940

***Shares on Loan: 0**

Shares Instructed: 3,940

Shares Voted: 3,940

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert E. Abernathy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Richard H. Fearon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Gregory J. Goff	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Neil Green	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director William R. Jellison	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.6	Elect Director Ashish K. Khandpur	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Sandra Beach Lin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Kim Ann Mink	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Ernest Nicolas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Kerry J. Preete	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Patricia Verduin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director William A. Wulfsohn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.14 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Avient Corporation

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/14/2025	Auto-Approved 04/14/2025	Shares Confirmed 04/22/2025	3,940	3,940
Total Shares:						3,940	3,940

Elevance Health, Inc.

Meeting Date: 05/14/2025 **Country:** USA **Ticker:** ELV **Proxy Level:** 3
Record Date: 03/17/2025 **Meeting Type:** Annual **Meeting ID:** 1947697
Primary Security ID: 036752103 **Primary CUSIP:** 036752103 **Primary ISIN:** US0367521038 **Primary SEDOL:** BSPHGL4

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 84 ***Shares on Loan:** 0 **Shares Instructed:** 84 **Shares Voted:** 84

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Susan D. DeVore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Bahija Jallal	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Ryan M. Schneider	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. CEO pay and performance are reasonably aligned for the year in review. Although a concern is noted about the lack of disclosure of forward-looking PSU targets under the LTIP, the majority of the CEO's pay remains conditioned on objective financial performance metrics.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.00 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Report on Effectiveness of Diversity, Equity, and Inclusion Efforts	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this resolution is warranted as enhanced disclosure would allow shareholders to better assess the effectiveness of the company's diversity initiatives, inclusive hiring efforts, and its management of related risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025		84	84
Total Shares:						84	84

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Hilton Worldwide Holdings Inc.

Meeting Date: 05/14/2025	Country: USA	Ticker: HLT	Proxy Level: 3
Record Date: 03/21/2025	Meeting Type: Annual	Meeting ID: 1950984	
Primary Security ID: 43300A203	Primary CUSIP: 43300A203	Primary ISIN: US43300A2033	Primary SEDOL: BYVMW06
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 193	*Shares on Loan: 0	Shares Instructed: 193	Shares Voted: 193

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Christopher J. Nassetta	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Jonathan D. Gray	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Charlene T. Begley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Chris Carr	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Melanie L. Healey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Raymond E. Mabus, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Marissa A. Mayer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Elizabeth A. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Douglas M. Steenland	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - Excessive differentials between CEO pay and the pay of other named executive officers at the firm; and - High CEO pay in relation to company peer group CEO median pay levels.</i>						
4	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i>						

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Hilton Worldwide Holdings Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company, and the other proposed changes will remove outdated language.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	193	193
Total Shares:						193	193

Primerica, Inc.

Meeting Date: 05/14/2025	Country: USA	Ticker: PRI	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1948618	
Primary Security ID: 74164M108	Primary CUSIP: 74164M108	Primary ISIN: US74164M1080	Primary SEDOL: B50K3X8
Votable Shares: 510	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 510	Shares Voted: 510

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John A. Addison, Jr.	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Joel M. Babbit	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Amber L. Cottle	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Gary L. Crittenden	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Cynthia N. Day	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1f	Elect Director Sanjeev Dheer	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1g	Elect Director Beatriz R. Perez	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1h	Elect Director D. Richard Williams	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Primerica, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Glenn J. Williams	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Darryl L. Wilson	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1k	Elect Director Barbara A. Yastine	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025	Shares Confirmed 04/24/2025	510	510
Total Shares:						510	510

SiteOne Landscape Supply, Inc.

Meeting Date: 05/14/2025	Country: USA	Ticker: SITE	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1949396	
Primary Security ID: 82982L103	Primary CUSIP: 82982L103	Primary ISIN: US82982L1035	Primary SEDOL: BYQ7X81
Votable Shares: 1,005	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,005	Shares Voted: 1,005

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Fred M. Diaz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director W. Roy Dunbar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Larisa J. Drake	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Declassify the Board of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as it enhances board accountability to shareholders and demonstrates a commitment to shareholders' interests on the part of management.</i>						

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SiteOne Landscape Supply, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	1,005	1,005
Total Shares:						1,005	1,005

AT&T Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: T	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1950505	
Primary Security ID: 00206R102	Primary CUSIP: 00206R102	Primary ISIN: US00206R1023	Primary SEDOL: 2831811
Votable Shares: 131	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 131	Shares Voted: 131

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Scott T. Ford	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director William E. Kennard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Stephen J. Luczo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Marissa A. Mayer	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.5	Elect Director Michael B. McCallister	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Beth E. Mooney	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Matthew K. Rose	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director John T. Stankey	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Cynthia B. Taylor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Luis A. Ubiñas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.75 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are aligned for the year in review. Concerns remain related to the CEO's relatively high salary and life insurance perquisite, and lack of forward-looking goal disclosure for the LTIP. However, annual and long-term incentives are primarily performance-conditioned and based on financial metrics, and the LTI utilizes a multi-year performance period.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/24/2025	Auto-Approved 04/24/2025		131	131
Total Shares:						131	131

BlackRock, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: BLK	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1950998	
Primary Security ID: 09290D101	Primary CUSIP: 09290D101	Primary ISIN: US09290D1019	Primary SEDOL: BMZBBT7
Votable Shares: 12	Total Ballots: 1 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 12	Shares Voted: 12

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Pamela Daley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Laurence D. Fink	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Gregory J. Fleming	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director William E. Ford	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Fabrizio Freda	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Murry S. Gerber	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Margaret "Peggy" L. Johnson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Robert S. Kapito	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Cheryl D. Mills	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Kathleen Murphy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Amin H. Nasser	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Gordon M. Nixon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Adebayo O. Ogunlesi	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1n	Elect Director Kristin C. Peck	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1o	Elect Director Charles H. Robbins	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1p	Elect Director Hans E. Vestberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1q	Elect Director Susan L. Wagner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1r	Elect Director Mark Wilson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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BlackRock, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: There remains some concern surrounding the nature of the incentive determination process, which is ultimately discretionary and lacks certain key disclosures, such as quantified target goals and per-metric weightings. Additionally, the new CEO carry program may create additional pay complexity going forward. However, these issues have not contributed to a quantitative pay-for-performance misalignment for the year in review. Additionally, the majority of LTI awards vest based on clearly disclosed multi-year goals. Notwithstanding, a vote AGAINST this proposal is warranted due to the high CEO pay relative to company performance compared to the company's peers and high CEO pay in relation to company peer group CEO median pay levels. Furthermore, a vote AGAINST this proposal is warranted in light of the committee's limited response to last year's low say-on-pay vote result. The committee engaged with shareholders and the proxy discloses shareholder feedback. However, the committee's actions in response to the two key topics of shareholder feedback, clarity on NEO pay determinations and one-time awards, do not amount to sufficient responsiveness. New disclosures related to the pay determination process are incremental and the committee did not take any firm actions, nor make any firm commitments, that appear to address concerns surrounding one-time awards.</i></p>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 10.85 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Report on Risks of Stakeholder Capitalism	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. While the proponent may fundamentally disagree with the company's broader strategy and its perspective as a fiduciary, BlackRock provides robust disclosure of its priorities, focus areas, and its role as fiduciary.</i></p>							
5	Require More Director Nominations Than Open Seats	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as the proponent has not made a compelling case to suggest that mandated contested elections are necessary.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/30/2025	Auto-Approved 04/30/2025		12	12
Total Shares:						12	12

Bunge Global SA

Meeting Date: 05/15/2025	Country: Switzerland	Ticker: BG	Proxy Level: N/A
Record Date: 03/14/2025	Meeting Type: Annual	Meeting ID: 1951155	
Primary Security ID: H11356104	Primary CUSIP: H11356104	Primary ISIN: CH1300646267	Primary SEDOL: BQ6BPG9
Votable Shares: 167	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 167	Shares Voted: 167

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this routine item is warranted.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Approve Treatment of Net Loss	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR these resolutions are warranted due to a lack of concerns.</i>						
3	Approve Dividends of USD 2.80 per Share from Capital Contribution Reserves	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR these resolutions are warranted due to a lack of concerns.</i>						
4	Approve Discharge of Board and Senior Management	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted, as there is no evidence that the board and senior management have not fulfilled their fiduciary duties.</i>						
5a	Elect Director Eliane Aleixo Lustosa de Andrade	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5b	Elect Director Carol Browner	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Carol Browner, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i>						
5c	Elect Director Gregory Heckman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5d	Elect Director Linda Jojo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5e	Elect Director Monica McGurk	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5f	Elect Director Kenneth Simril	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5g	Elect Director Henry "Jay" Winship	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5h	Elect Director Mark Zenuk	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5i	Elect Director Adrian Isman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5j	Elect Director Anne Jensen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5k	Elect Director Christopher Mahoney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5l	Elect Director Markus Walt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
6a	Reelect Mark Zenuk as Board Chairman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR the election of Mark Zenuk as board chair is warranted.</i>							
7a	Reelect Monica McGurk as Member of the Human Resources and Compensation Committee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR the election of Monica McGurk, Kenneth Simril, Markus Walt, and Henry "Jay" Winship to the Human Resources and Compensation Committee are warranted.</i>							
7b	Reelect Kenneth Simril as Member of the Human Resources and Compensation Committee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR the election of Monica McGurk, Kenneth Simril, Markus Walt, and Henry "Jay" Winship to the Human Resources and Compensation Committee are warranted.</i>							
7c	Reelect Markus Walt as Member of the Human Resources and Compensation Committee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR the election of Monica McGurk, Kenneth Simril, Markus Walt, and Henry "Jay" Winship to the Human Resources and Compensation Committee are warranted.</i>							
7d	Reelect Henry "Jay" Winship as Member of the Human Resources and Compensation Committee	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR the election of Monica McGurk, Kenneth Simril, Markus Walt, and Henry "Jay" Winship to the Human Resources and Compensation Committee are warranted.</i>							
8	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and company performance are reasonably aligned at this time. A majority of annual and long-term incentives are based on objective financial measures.</i>							
9a	Approve Remuneration of Directors in the Amount of USD 5.4 million	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted because the requested amount is broadly in line with market practice.</i>							
9b	Approve Remuneration of Executive Committee in the Amount of USD 38.9 million for Fiscal Year 2026	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: As the company is classified as a US domestic issuer, and given that the focus of this proposal is on top executive pay, the recommendation for this proposal is aligned to the US say-on-pay analysis. Accordingly, a vote FOR this proposal is warranted.</i>							
9c	Approve Remuneration Report	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: As the company is reporting as a U.S. domestic issuer and given that the focus of this proposal is on top executive pay, the recommendation for this proposal is aligned with the U.S. say-on pay analysis. Accordingly, a vote FOR is warranted.</i>							
10	Approve Non-Financial Report	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR the approval of the company's non-financial report is warranted due to a lack of significant concerns.</i>							

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Bunge Global SA

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
11	Designate Wuersch & Gering LLP as Independent Proxy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted due to a lack of concerns.</i>							
12	Appoint Deloitte & Touche LLP as Auditor and Reelect Deloitte SA as Swiss Statutory Auditor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
A	Other Business	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as proposals which are detrimental to shareholder value may arise without shareholders having the opportunity to make a fully informed vote on the issue.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		167	167
Total Shares:						167	167

Chubb Limited

Meeting Date: 05/15/2025	Country: Switzerland	Ticker: CB	Proxy Level: N/A
Record Date: 03/21/2025	Meeting Type: Annual	Meeting ID: 1948942	
Primary Security ID: H1467J104	Primary CUSIP: H1467J104	Primary ISIN: CH0044328745	Primary SEDOL: B3BQMF6
Votable Shares: 13	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 13	Shares Voted: 13

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	Yes	For	For	For	For
2.1	Allocate Disposable Profit	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR these proposals are warranted due to a lack of significant concerns.</i>							
2.2	Approve Dividend Distribution From Legal Reserves Through Capital Contributions Reserve Subaccount	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Votes FOR these proposals are warranted due to a lack of significant concerns.</i>							
3	Approve Discharge of Board of Directors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted, as there is no evidence that the board has not fulfilled their fiduciary duties.</i>							
4.1	Ratify PricewaterhouseCoopers AG (Zurich) as Statutory Auditor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.31 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4.2	Ratify PricewaterhouseCoopers LLP (United States) as Independent Registered Accounting Firm	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.31 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4.3	Ratify BDO AG (Zurich) as Special Audit Firm	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal to ratify the special auditor is warranted.</i>						
5.1	Elect Director Evan G. Greenberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.2	Elect Director Michael P. Connors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.3	Elect Director Michael G. Atieh	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.4	Elect Director Nancy K. Buese	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.5	Elect Director Sheila P. Burke	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.6	Elect Director Nelson J. Chai	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.7	Elect Director Michael L. Corbat	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.8	Elect Director Fred Hu	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
5.9	Elect Director Robert J. Hugin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.10	Elect Director Robert W. Scully	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.11	Elect Director Theodore E. Shasta	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.12	Elect Director David H. Sidwell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.13	Elect Director Olivier Steimer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
5.14	Elect Director Frances F. Townsend	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
6	Elect Evan G. Greenberg as Board Chairman	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST Evan G. Greenberg as board chair is warranted because he serves as combined CEO/chair.</i>						
7.1	Elect Michael P. Connors as Member of the Compensation Committee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR the proposed nominees are warranted due to the lack of governance concerns and controversy surrounding the board of directors (other than the combination of the chair and CEO roles).</i>						
7.2	Elect Michael L. Corbat as Member of the Compensation Committee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR the proposed nominees are warranted due to the lack of governance concerns and controversy surrounding the board of directors (other than the combination of the chair and CEO roles).</i>						
7.3	Elect David H. Sidwell as Member of the Compensation Committee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR the proposed nominees are warranted due to the lack of governance concerns and controversy surrounding the board of directors (other than the combination of the chair and CEO roles).</i>						
7.4	Elect Frances F. Townsend as Member of the Compensation Committee	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Votes FOR the proposed nominees are warranted due to the lack of governance concerns and controversy surrounding the board of directors (other than the combination of the chair and CEO roles).</i>						
8	Designate Homburger AG as Independent Proxy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted due to a lack of concerns.</i>						
9	Approve Renewal of a Capital Band for Authorized Share Capital Increases and Reductions	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these resolutions is warranted because the proposed amount and duration are within recommended limits.</i>						
10.1	Approve Remuneration of Directors in the Amount of USD 6.5 Million	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because the requested amount is broadly in line with market practice.</i>						
10.2	Approve Remuneration of Executive Management in the Amount of USD 78 Million for Fiscal 2026	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: As the company is classified as a US domestic issuer, and given that the focus of this proposal is on top executive pay, the recommendation for this proposal is aligned to the US say-on-pay analysis. Accordingly, a vote FOR this proposal is warranted.</i>						
10.3	Approve Remuneration Report	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: As the company is reporting as a U.S. domestic issuer and given that the focus of this proposal is on top executive pay, the recommendation for this proposal is aligned with the U.S. say-on-pay analysis. Accordingly, a vote FOR is warranted.</i>						

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Chubb Limited

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
11	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: On balance, a vote FOR this proposal is warranted. The largely discretionary annual incentive award paired with certain lacking key disclosures raises some concern. Nevertheless, these issues have not contributed to a quantitative pay-for-performance misalignment. Additionally, the CEO's LTI equity awards are entirely performance-contingent, subject to multi-year goals.</i></p>							
12	Approve Sustainability Report	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR the approval of the company's non-financial report is warranted due to a lack of significant concerns.</i></p>							
13	Report on GHG Emissions Associated with Underwriting, Insuring, and Investment Activities	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted because it would help shareholders better understand the company's climate-related risks from its underwriting, investment, and insurance activities.</i></p>							
A	Transact Other Business	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as proposals which are detrimental to shareholder value may arise without shareholders having the opportunity to make a fully informed vote on the issue.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/01/2025	Auto-Approved 05/01/2025		13	13
Total Shares:						13	13

CoreCivic, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: CXW	Proxy Level: 3
Record Date: 03/21/2025	Meeting Type: Annual	Meeting ID: 1947992	
Primary Security ID: 21871N101	Primary CUSIP: 21871N101	Primary ISIN: US21871N1019	Primary SEDOL: BZ8VC58
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 234	*Shares on Loan: 0	Shares Instructed: 234	Shares Voted: 234

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Emkes	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Alexander R. Fischer	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Catherine Hernandez-Blades	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Damon T. Hininger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Stacia A. Hylton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Harley G. Lappin	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Thurgood Marshall, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Devin I. Murphy	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1i	Elect Director John R. Prann, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director S. Dawn Smith	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Stacey M. Tank	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director Nina A. Tran	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.80 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed	Auto-Approved	Shares Confirmed	234	234
			04/23/2025	04/23/2025	04/25/2025		
Total Shares:						234	234

CVS Health Corporation

Meeting Date: 05/15/2025	Country: USA	Ticker: CVS	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1950991	
Primary Security ID: 126650100	Primary CUSIP: 126650100	Primary ISIN: US1266501006	Primary SEDOL: 2577609

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 101

*Shares on Loan: 0

Shares Instructed: 101

Shares Voted: 101

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Fernando Aguirre	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Jeffrey R. Balsler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director C. David Brown, II	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Alecia A. DeCoudreaux	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Roger N. Farah	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Anne M. Finucane	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director J. David Joyner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director J. Scott Kirby	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Michael F. Mahoney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Leslie V. Norwalk	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1k	Elect Director Larry M. Robbins	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Guy P. Sansone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Douglas H. Shulman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.26 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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CVS Health Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although some concerns exist regarding disclosure under the LTI program, annual and long-term incentives were sufficiently performance-based, PSUs were entirely tied to multi-year metrics, and below-target payouts were aligned with performance. In addition, the new CEO's promotional grant, while relatively large, was entirely in premium-priced appreciation awards. These factors mitigate the pay-for-performance misalignment for the year under review. However, a problematic pay practice has been identified with respect to the former CEO's severance arrangements. Specifically, in connection with the CEO's termination, the company entered into a new agreement that enhanced the treatment of her outstanding equity awards, allowing all of the awards to continue vesting. The enhanced treatment has the potential to add significant additional value and is not supported by a compelling rationale.</i></p>							
4	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. A reduction in the ownership threshold would provide a more meaningful written consent right for shareholders.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/25/2025	Auto-Approved 04/25/2025		101	101
Total Shares:						101	101

Insméd Incorporated

Meeting Date: 05/15/2025	Country: USA	Ticker: INSM	Proxy Level: 3
Record Date: 03/07/2025	Meeting Type: Annual	Meeting ID: 1950814	
Primary Security ID: 457669307	Primary CUSIP: 457669307	Primary ISIN: US4576693075	Primary SEDOL: 2614487
Votable Shares: 1,220	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,220	Shares Voted: 1,220

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Leo Lee	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director William H. Lewis	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Insmmed Incorporated

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/21/2025	Auto-Approved 04/21/2025	Shares Confirmed 04/22/2025	1,220	1,220
Total Shares:						1,220	1,220

Kinder Morgan, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: KMI	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1950902	
Primary Security ID: 49456B101	Primary CUSIP: 49456B101	Primary ISIN: US49456B1017	Primary SEDOL: B3NQ4P8
Votable Shares: 340	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 340	Shares Voted: 340

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Richard D. Kinder	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.2	Elect Director Kimberly A. Dang	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.3	Elect Director Amy W. Chronis	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.4	Elect Director Ted A. Gardner	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.5	Elect Director Anthony W. Hall, Jr.	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.6	Elect Director Steven J. Kean	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.7	Elect Director Michael C. Morgan	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.8	Elect Director Arthur C. Reichstetter	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.9	Elect Director C. Park Shaper	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							

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Kinder Morgan, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director William A. Smith	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1.11	Elect Director Robert F. Vagt	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.21 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns ae notes, a vote FOR this proposal is warranted as pay and performance were reasonably aligned for the year in review.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/30/2025	Auto-Approved 04/30/2025		340	340
Total Shares:						340	340

Martin Marietta Materials, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: MLM	Proxy Level: 3
Record Date: 03/07/2025	Meeting Type: Annual	Meeting ID: 1955970	
Primary Security ID: 573284106	Primary CUSIP: 573284106	Primary ISIN: US5732841060	Primary SEDOL: 2572079
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 134	*Shares on Loan: 0	Shares Instructed: 134	Shares Voted: 134

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Dorothy M. Ables	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Dorothy Ables, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i>						
1.2	Elect Director Sue W. Cole	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Anthony R. Foxx	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director John J. Koraleski	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Mary T. Mack	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Martin Marietta Materials, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director C. Howard Nye	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Laree E. Perez	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Thomas H. Pike	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Donald W. Slager	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director David C. Wajsgas	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - High CEO pay relative to company performance compared to the company's peers; - High CEO pay in relation to company peer group CEO median pay levels; and - Excessive differentials between CEO pay and the pay of other named executive officers at the firm.</i>						
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The purchase price is reasonable; - The number of shares reserved is relatively conservative; and - The offer period is within the prescribed limits under Section 423 of the Internal Revenue Code.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		134	134
			05/02/2025	05/02/2025			
Total Shares:						134	134

Morgan Stanley

Meeting Date: 05/15/2025	Country: USA	Ticker: MS	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1951071	
Primary Security ID: 617446448	Primary CUSIP: 617446448	Primary ISIN: US6174464486	Primary SEDOL: 2262314

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 105

*Shares on Loan: 0

Shares Instructed: 105

Shares Voted: 105

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Megan Butler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Thomas H. Glocer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1c	Elect Director Robert H. Herz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Erika H. James	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Hironori Kamezawa	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Shelley B. Leibowitz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Jami Miscik	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Masato Miyachi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Dennis M. Nally	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Douglas L. Peterson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Edward Pick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Mary L. Schapiro	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Perry M. Traquina	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1n	Elect Director Rayford Wilkins, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. There are some continuing concerns regarding the committee's discretion in determining NEOs' total pay and the lack of certain key disclosures surrounding the annual pay assessment. Additionally, modifications were made to the definition of a metric for in-flight awards, which resulted in realized incremental fair value. Nonetheless, sufficient mitigating factors have been identified for the year in review. In particular, CEO pay and company performance are reasonably aligned at this time, and the CEO's FY24 total pay was set below the former CEO and executive chairman's FY23 pay. Additionally, financial metrics considered under the performance assessment were generally consistent year-over-year, the majority of equity awards are based on clearly-disclosed multi-year goals, and the relative metric targets outperformance. Lastly, the incremental fair value arising from the modification of in-cycle metric definition was relatively modest and did not result in elevated pay levels.</i></p>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The three-year average burn rate is excessive; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); and - The plan permits liberal recycling of shares</i></p>							
5	Report Annually on Energy Supply Ratio	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as it would help shareholders better evaluate the company's management of climate risks from its lending and underwriting activities.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/30/2025	Auto-Approved 04/30/2025		105	105
Total Shares:						105	105

Power Integrations, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: POWI	Proxy Level: 3
Record Date: 03/17/2025	Meeting Type: Annual	Meeting ID: 1948293	
Primary Security ID: 739276103	Primary CUSIP: 739276103	Primary ISIN: US7392761034	Primary SEDOL: 2133045
Votable Shares: 2,424	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 2,424	Shares Voted: 2,424

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Wendy Arienzo	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Balu Balakrishnan	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Nicholas E. Brathwaite	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Power Integrations, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Anita Ganti	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Nancy Gioia	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Balakrishnan S. Iyer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Gregg Lowe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Ravi Vig	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 10.67 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Eliminate Supermajority Vote Requirement	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i>						
5	Amend Restricted Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on an analysis of the plan amendments, a vote FOR this proposal is warranted.</i>						
6	Require Independent Board Chair	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chairman of the board.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025		2,424	2,424
Total Shares:						2,424	2,424

Repligen Corporation

Meeting Date: 05/15/2025	Country: USA	Ticker: RGEN	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1951009	
Primary Security ID: 759916109	Primary CUSIP: 759916109	Primary ISIN: US7599161095	Primary SEDOL: 2731654

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 573

*Shares on Loan: 0

Shares Instructed: 573

Shares Voted: 573

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Olivier Loeillot	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Tony J. Hunt	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Karen A. Dawes	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1d	Elect Director Nicolas M. Barthelemy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Carrie Eglinton Manner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Konstantin Konstantinov	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Martin D. Madaus	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Rohin Mhatre	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Glenn P. Muir	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Margaret A. Pax	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 11.76 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Repligen Corporation

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/30/2025	Auto-Approved 04/30/2025		573	573
Total Shares:						573	573

Texas Roadhouse, Inc.

Meeting Date: 05/15/2025 **Country:** USA **Ticker:** TXRH **Proxy Level:** 3
Record Date: 03/17/2025 **Meeting Type:** Annual **Meeting ID:** 1950803
Primary Security ID: 882681109 **Primary CUSIP:** 882681109 **Primary ISIN:** US8826811098 **Primary SEDOL:** B033TJ7

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 766 ***Shares on Loan:** 0 **Shares Instructed:** 766 **Shares Voted:** 766

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jane Grote Abell	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Michael A. Crawford	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Donna E. Epps	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Wayne L. Jones	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Gregory N. Moore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Gerald L. Morgan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Curtis A. Warfield	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Kathleen M. Widmer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.50 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. The compensation committee demonstrated only limited responsiveness to concerns following last year's low say-on-pay vote result.</i>							

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Texas Roadhouse, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Adopt a Policy to Disclose EEO-1 Report	SH	Yes	Against	Against	For	For

Voting Policy Rationale: A vote FOR this resolution is warranted, as additional diversity-related disclosure would allow shareholders to better assess the effectiveness of the company's diversity initiatives and its management of related risks.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/24/2025	Auto-Approved 04/24/2025		766	766
Total Shares:						766	766

Ultragenyx Pharmaceutical Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: RARE	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1947700	
Primary Security ID: 90400D108	Primary CUSIP: 90400D108	Primary ISIN: US90400D1081	Primary SEDOL: BJ62Z18
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,709	*Shares on Loan: 0	Shares Instructed: 1,709	Shares Voted: 1,709

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Matthew K. Fust	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Amrit Ray	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The equity program is estimated to be excessively dilutive (overriding factor); - The plan cost is excessive; and - The plan allows broad discretion to accelerate vesting.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.19 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although a majority of the CEO's annual and long-term incentives are tied to performance conditions, clear disclosure of specific targets and achievements under the annual incentive program is lacking. In addition, forward-looking disclosure continues to be lacking under the LTI program. While there are certain positive changes to the LTI program for FY25, concerns remain regarding goal rigor for the relative TSR metric and the relatively short performance period for one-third of the PSUs. The CEO's relatively large total target LTI award value continues to raise concern as well.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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**Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.*

Ultragenyx Pharmaceutical Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025	Shares Confirmed 04/24/2025	1,709	1,709
Total Shares:						1,709	1,709

PPL Corporation

Meeting Date: 05/16/2025	Country: USA	Ticker: PPL	Proxy Level: 3
Record Date: 03/04/2025	Meeting Type: Annual	Meeting ID: 1949583	
Primary Security ID: 69351T106	Primary CUSIP: 69351T106	Primary ISIN: US69351T1060	Primary SEDOL: 2680905
Votable Shares: 925	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 925
	*Shares on Loan: 0	Shares Instructed: 925	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Arthur P. Beattie	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Raja Rajamannar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Heather B. Redman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Craig A. Rogerson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Vincent Sorgi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Linda G. Sullivan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Natica von Althann	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Keith H. Williamson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Phoebe A. Wood	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Armando Zagalo de Lima	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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PPL Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. Some concern persists regarding the LTI TSR metric which targets merely median performance and for which there is no disclosed cap on vesting in the event of negative absolute TSR. However, the STIP was based primarily on a pre-set financial metric and the LTI awards were largely performance-based with clearly disclosed multi-year goals.</i></p>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.58 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Disclose Third Party Assessment of GHG Emissions Alignment with Paris Agreement Goals	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional information on the company's efforts to align its greenhouse gas emissions reduction targets with the Paris Agreement goals would help the company better address risks related to climate change. Additionally, third party reporting can provide assurance to shareholders on the company's transparency and commitment to the reduction of its greenhouse gas emissions.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 04/25/2025	Auto-Approved 04/25/2025		925	925
Total Shares:						925	925

AtriCure, Inc.

Meeting Date: 05/19/2025	Country: USA	Ticker: ATRC	Proxy Level: 3
Record Date: 03/27/2025	Meeting Type: Annual	Meeting ID: 1951617	
Primary Security ID: 04963C209	Primary CUSIP: 04963C209	Primary ISIN: US04963C2098	Primary SEDOL: B0C8KV2
Votable Shares: 1,912	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,912	Shares Voted: 1,912

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael H. Carrel	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Regina E. Groves	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director B. Kristine Johnson	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Shlomo Nachman	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Karen N. Prange	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Deborah H. Telman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Sven A. Wehrwein	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1h	Elect Director Robert S. White	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Maggie Yuen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: The CEO's outsized total LTI award value for FY24 contributed to a pay-for-performance misalignment for the year in review, driven by a large one-time retention grant. Although some concern is raised regarding the lack of a compelling rationale for the magnitude of the retention grant, particularly in conjunction with an already large annual LTI grant, the award itself is tied to stock price hurdles that appear to be rigorous and the structure of the award does not otherwise raise concern. In addition, although some disclosure concerns are raised with respect to the annual incentive program, annual and long-term incentives were sufficiently tied to performance objectives, and relative TSR targets under the LTI program are reasonably rigorous. Although forward-looking revenue CAGR targets and specific closing cycle achievement for FY22 PSAs were not disclosed in the proxy statement, the company disclosed this information in an additional filing, mitigating disclosure concerns under the LTI program. Given these factors, the pay-for-performance misalignment is mitigated, and a vote FOR this proposal is warranted, with caution.</i>							
5	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/07/2025	Auto-Approved 05/07/2025		1,912	1,912
Total Shares:						1,912	1,912

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Chart Industries, Inc.

Meeting Date: 05/20/2025	Country: USA	Ticker: GTLS	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1952276	
Primary Security ID: 16115Q308	Primary CUSIP: 16115Q308	Primary ISIN: US16115Q3083	Primary SEDOL: B19HNF4
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,058	*Shares on Loan: 0	Shares Instructed: 1,058	Shares Voted: 1,058

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jillian C. Evanko	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Andrew R. Cichocki	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Paula M. Harris	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Linda A. Harty	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Paul E. Mahoney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director David M. Sagehorn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Spencer S. Stiles	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Roger A. Strauch	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; and - Excessive differentials between CEO pay and the pay of other named executive officers at the firm.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/01/2025	Auto-Approved 05/01/2025		1,058	1,058
Total Shares:						1,058	1,058

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Installed Building Products, Inc.

Meeting Date: 05/20/2025	Country: USA	Ticker: IBP	Proxy Level: 3
Record Date: 03/25/2025	Meeting Type: Annual	Meeting ID: 1951908	
Primary Security ID: 45780R101	Primary CUSIP: 45780R101	Primary ISIN: US45780R1014	Primary SEDOL: BJSP4C9
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 855	*Shares on Loan: 0	Shares Instructed: 855	Shares Voted: 855

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jeffrey W. Edwards	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Lawrence A. Hilsheimer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Janet E. Jackson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company allows for full board discretion in determining the treatment of outstanding upon a change in control.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 04/23/2025	Auto-Approved 04/23/2025		855	855
Total Shares:						855	855

JPMorgan Chase & Co.

Meeting Date: 05/20/2025	Country: USA	Ticker: JPM	Proxy Level: 3
Record Date: 03/21/2025	Meeting Type: Annual	Meeting ID: 1951338	
Primary Security ID: 46625H100	Primary CUSIP: 46625H100	Primary ISIN: US46625H1005	Primary SEDOL: 2190385
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 30	*Shares on Loan: 0	Shares Instructed: 30	Shares Voted: 30

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Michele G. Buck	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Stephen B. Burke	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Todd A. Combs	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Alicia Boler Davis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director James Dimon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Alex Gorsky	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Mellody Hobson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Phebe N. Novakovic	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Virginia M. Rometty	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Brad D. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Mark A. Weinberger	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. There are some ongoing concerns regarding the discretionary determination of NEOs' total incentive awards and the lack of certain key disclosures. However, the financial metrics considered were generally consistent year-over-year and equity awards were majority performance-conditioned based on clearly disclosed multi-year goals. Most notably, these issues have not resulted in a quantitative pay-for-performance misalignment for the year in review. A quantitative pay-for-performance misalignment going forward may be met with increased scrutiny of pay program structure and disclosures.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Require Independent Board Chair	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chairman of the board.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
5	Report on Social Impacts of Climate Transition Finance	SH	Yes	Against	Against	For	For

Voting Policy Rationale: A vote FOR this proposal is warranted as the requested disclosure would enable shareholders to better assess how the company is managing risks related to transition finance and a just transition, in alignment with climate change goals.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/05/2025	Auto-Approved 05/05/2025		30	30
Total Shares:						30	30

Viking Therapeutics, Inc.

Meeting Date: 05/20/2025	Country: USA	Ticker: VKTX	Proxy Level: 3
Record Date: 03/31/2025	Meeting Type: Annual	Meeting ID: 1951843	
Primary Security ID: 92686J106	Primary CUSIP: 92686J106	Primary ISIN: US92686J1060	Primary SEDOL: BQQG1V1
Total Ballots: 1	Voting Policy: UUA		
Votable Shares: 93	*Shares on Loan: 0	Shares Instructed: 93	Shares Voted: 93

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Matthew W. Foehr	Mgmt	Yes	For	Withhold	Withhold	Withhold

Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for incumbent director nominees Matthew (Matt) Foehr and Charles Rowland Jr. due to the following reasons: - the board's failure to adequately address the lack of majority support for Macartney at last year's annual meeting; and - in the absence of Governance Committee members on the ballot, the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.

1.2	Elect Director Charles A. Rowland, Jr.	Mgmt	Yes	For	Withhold	Withhold	Withhold
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Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for incumbent director nominees Matthew (Matt) Foehr and Charles Rowland Jr. due to the following reasons: - the board's failure to adequately address the lack of majority support for Macartney at last year's annual meeting; and - in the absence of Governance Committee members on the ballot, the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.

2	Ratify CBIZ CPAs P.C. as Auditors	Mgmt	Yes	For	For	For	For
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Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted.

3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
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Voting Policy Rationale: A vote AGAINST this proposal is warranted as the company has not disclosed any short- and long-term E&S performance incentives, and the company provides for automatic accelerated vesting of equity awards upon a change in control. Moreover, although approximately half of the CEO's LTI awards consisted of performance equity, both forward looking and retrospective metric and target disclosure is lacking. Lastly, concern is noted about the annual incentive program, as the company does not disclose per-metric weightings, and pay determinations appear to ultimately incorporate a significant degree of discretion.

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Viking Therapeutics, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/08/2025	Auto-Approved 05/08/2025		93	93
Total Shares:						93	93

Amazon.com, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: AMZN	Proxy Level: 3
Record Date: 03/27/2025	Meeting Type: Annual	Meeting ID: 1953358	
Primary Security ID: 023135106	Primary CUSIP: 023135106	Primary ISIN: US0231351067	Primary SEDOL: 2000019
Votable Shares: 80	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 80
	*Shares on Loan: 0	Shares Instructed: 80	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey P. Bezos	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Andrew R. Jassy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Keith B. Alexander	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Edith W. Cooper	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Jamie S. Gorelick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Daniel P. Huttenlocher	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Andrew Y. Ng	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Indra K. Nooyi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Jonathan J. Rubinstein	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Brad D. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Patricia Q. Stonesifer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Wendell P. Weeks	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.62 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. While pay to CEO Jassy was negligible in FY24, other NEOs received sizable time-vesting stock awards, with each non-CEO NEO receiving grants near or in excess of median CEO pay at peers. While it is recognized that grants are typically provided on a periodic basis and the company provides a robust rationale for its structure, it remains a significant concern that no portion of NEO compensation is directly tied to the achievement of pre-set performance criteria.</i>						
4	Adopt Mandatory Policy Separating the Roles of CEO and Board Chair	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted shareholders would benefit from a policy requiring more independent oversight of management in the form of an independent chairman.</i>						
5	Report on Risks of Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The board has current committees with relevant oversight responsibilities, and the company has implemented policies that provide sufficient information on use of its services and when the company may restrict or remove products or content.</i>						
6	Disclose All Material Scope 3 Emissions	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted considering: - Amazon's limited adoption of Scope 3 carbon reporting; - The company's lack of disclosure regarding emissions from third-party sales unlike many of its major retail peers, which may expose the company to some risk as emissions regulations come into effect or are adopted in some jurisdictions; and - Ongoing controversies surrounding the company's climate and environmental practices. Expanded Scope 3 disclosure would enhance transparency and enable shareholders to more accurately evaluate Amazon's environmental risks and sustainability performance.</i>						
7	Report on Impact of Data Centers on Climate Commitments	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as a further assessment of the impact of data centers on Amazon's climate commitments would enable shareholders to thoroughly review and evaluate the credibility and achievability of the company's net-zero strategy.</i>						
8	Commission Third Party Assessment of Board Oversight of Human Rights Risks of AI	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because a third-party assessment would provide valuable insights and enable both the company and its shareholders to better understand and evaluate the effectiveness of its policies, while also promoting greater transparency.</i>						
9	Report on Efforts to Reduce Plastic Packaging	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as a further assessment of its efforts to reduce plastic packaging would provide valuable insights and help the company mitigate associated risks.</i>						

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Amazon.com, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
10	Commission Independent Audit and Report on Warehouse Working Conditions	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Concerns are raised regarding recent work-place related violations and resulting negative media attention. In this regard, an independent audit would enable both the company and its shareholders to identify material and emerging risk factors, while also providing an opportunity to strengthen or revise workplace safety policies.</i></p>							
11	Report on Unethical Use of External Data in Development of AI Products	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as improved transparency would provide shareholders the ability to evaluate the benefits and risks associated with the company's use of external data in the development of its artificial intelligence (AI) projects.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/05/2025	Auto-Approved 05/05/2025		80	80
Total Shares:						80	80

CBRE Group, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: CBRE	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1950796	
Primary Security ID: 12504L109	Primary CUSIP: 12504L109	Primary ISIN: US12504L1098	Primary SEDOL: B6WVMH3
Votable Shares: 127	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 127
	*Shares on Loan: 0	Shares Instructed: 127	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Brandon B. Boze	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Vincent Clancy	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Beth F. Cobert	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Reginald H. Gilyard	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1e	Elect Director Shira D. Goodman	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Gerardo I. Lopez	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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CBRE Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Guy A. Metcalfe	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1h	Elect Director Gunjan Soni	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Robert E. Sulentic	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Sanjiv Yajnik	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.31 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance were reasonably aligned for the year in review. While there is some concern regarding how half of the PRSUs are earned based on annual performance goals, the vast majority of the CEO's compensation remains conditioned on financial performance. Further, a relative-TSR metric introduced to the LTIP is measured over a three-year period.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		127	127
Total Shares:						127	127

First Watch Restaurant Group, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: FWRG	Proxy Level: 1
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1952219	
Primary Security ID: 33748L101	Primary CUSIP: 33748L101	Primary ISIN: US33748L1017	Primary SEDOL: BMDTR28
Votable Shares: 8,297	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 8,297	Shares Voted: 8,297

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael Fleisher	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director William Kussell	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member William Kussell given the board's failure to remove, or subject to a sunset requirement, the classified board which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>						

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First Watch Restaurant Group, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Stephanie Lilak	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Jostein Solheim	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		8,297	8,297
Total Shares:						8,297	8,297

Five9, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: FIVN	Proxy Level: 3
Record Date: 03/25/2025	Meeting Type: Annual	Meeting ID: 1951619	
Primary Security ID: 338307101	Primary CUSIP: 338307101	Primary ISIN: US3383071012	Primary SEDOL: BKY7X18
Votable Shares: 4,547	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 4,547	Shares Voted: 4,547

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Susan (Sue) Barsamian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Jonathan Mariner	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members David (Dave) Welsh and Jonathan Mariner given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR Susan (Sue) Barsamian is warranted.</i>							
1.3	Elect Director David S. Welsh	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members David (Dave) Welsh and Jonathan Mariner given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR Susan (Sue) Barsamian is warranted.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The annual bonus was based entirely on rigorous financial metrics. Additionally, the LTI program was half based on performance equity for the CEO and also utilized rigorous relative targets.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because only 1.96 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		4,547	4,547
Total Shares:						4,547	4,547

Halliburton Company

Meeting Date: 05/21/2025	Country: USA	Ticker: HAL	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1948610	
Primary Security ID: 406216101	Primary CUSIP: 406216101	Primary ISIN: US4062161017	Primary SEDOL: 2405302

Votable Shares: 120	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 120
	*Shares on Loan: 0	Shares Instructed: 120	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Abdulaziz F. Al Khayyal	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director William E. Albrecht	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director M. Katherine Banks	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Alan M. Bennett	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Earl M. Cummings	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Murry S. Gerber	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Robert A. Malone	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1h	Elect Director Jeffrey A. Miller	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Maurice S. Smith	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Halliburton Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Janet L. Weiss	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Tobi M. Edwards Young	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.80 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as pay and performance are reasonably aligned at this time. Annual incentives are primarily based on preset financial metrics and above-target payouts on the non-financial metrics are not possible. Long-term incentives are majority performance-based, with performance measured over a multi-year period and targeting above the peer median.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		120	120
Total Shares:						120	120

Phillips 66

Meeting Date: 05/21/2025	Country: USA	Ticker: PSX	Proxy Level: 6
Record Date: 04/04/2025	Meeting Type: Proxy Contest	Meeting ID: 1950300	
Primary Security ID: 718546104	Primary CUSIP: 718546104	Primary ISIN: US7185461040	Primary SEDOL: B78C4Y8
Votable Shares: 4,815	Total Ballots: 3	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 4,815	Shares Voted: 4,815

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	Management Universal Proxy (White Proxy Card)	Mgmt	No				
	From the Combined List of Management & Dissident Nominees - Elect 4 Directors	Mgmt	No				
1a	Elect Management Nominee Director A. Nigel Hearne	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1b	Elect Management Nominee Director John E. Lowe	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							

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Phillips 66

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1c	Elect Management Nominee Director Robert W. Pease	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1d	Elect Management Nominee Director Howard I. Ungerleider	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1e	Elect Dissident Nominee Director Brian S. Coffman	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1f	Elect Dissident Nominee Director Sigmund L. Cornelius	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1g	Elect Dissident Nominee Director Michael A. Heim	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
1h	Elect Dissident Nominee Director Stacy D. Nieuwoudt	SH	Yes	Withhold	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
2	Declassify the Board of Directors	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
5	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
6	Adopt Policy Requiring Annual Director Resignations	SH	Yes	Against	Do Not Vote	Do Not Vote	Do Not Vote
<i>Voting Policy Rationale: DO NOT VOTE on this card.</i>							
	Dissident Universal Proxy (Gold Proxy Card)	Mgmt	No				
	From the Combined List of Management & Dissident Nominees - Elect 4 Directors	Mgmt	No				
	ELLIOTT NOMINEES	Mgmt	No				
1a	Elect Dissident Nominee Director Brian S. Coffman	SH	Yes	For	For	For	For
<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Dissident Nominee Director Sigmund L. Cornelius	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
1c	Elect Dissident Nominee Director Michael A. Heim	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
1d	Elect Dissident Nominee Director Stacy D. Nieuwoudt	SH	Yes	For	For	For	For
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
	COMPANY NOMINEES OPPOSED BY ELLIOTT	Mgmt	No				
1a	Elect Management Nominee Director A. Nigel Hearne	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
1b	Elect Management Nominee Director John E. Lowe	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
1c	Elect Management Nominee Director Robert W. Pease	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
1d	Elect Management Nominee Director Howard I. Ungerleider	Mgmt	Yes	Withhold	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The dissident has presented a compelling case for change. As such, votes FOR Brian Coffman, Sigmund Cornelius, Michael Heim, and Stacy Nieuwoudt are warranted on the dissident card.</i>						
2	Declassify the Board of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as it would enhance board accountability to shareholders.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	None	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay is reasonably aligned with performance for the year under review and annual and long-term incentives are sufficiently tied to performance.</i>						
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	None	One Year	One Year	One Year
	<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>						
5	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	None	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted because only 2.19 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Phillips 66

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
6	Adopt Policy Requiring Annual Director Resignations	SH	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Shareholder support for the binding management resolution to declassify the board (see Item 2) is considered a more compelling avenue to effect annual director elections at this meeting. Moreover, it is not clear if a voluntary resignation policy is an effective long-term solution to annual director elections, given that each of the directors would have to agree to submit a resignation letter each year.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		1,605	1,605
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Sent	Auto-Instructed 05/19/2025	Auto-Approved 05/19/2025		1,605	1,605
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Sent	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		1,605	1,605
Total Shares:						4,815	4,815

Pinnacle West Capital Corporation

Meeting Date: 05/21/2025	Country: USA	Ticker: PNW	Proxy Level: 3
Record Date: 03/14/2025	Meeting Type: Annual	Meeting ID: 1951718	
Primary Security ID: 723484101	Primary CUSIP: 723484101	Primary ISIN: US7234841010	Primary SEDOL: 2048804
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 70	*Shares on Loan: 0	Shares Instructed: 70	Shares Voted: 70

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Glynis A. Bryan	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Ronald Butler, Jr.	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Gonzalo A. de la Melena, Jr.	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.4	Elect Director Carol S. Eicher	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.5	Elect Director Susan T. Flanagan	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.6	Elect Director Richard P. Fox	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Pinnacle West Capital Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Theodore N. Geisler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Paula J. Sims	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director William H. Spence	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Kristine L. Svinicki	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director James E. Trevathan, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR the proposal is warranted. Pay and performance are reasonably aligned for the year in review. Some concerns are noted regarding the incomplete goal disclosure under the LTIP and the absence of a disclosed payout cap in the event of negative absolute TSR. Nevertheless, the LTI program is predominantly performance based and the annual incentive is entirely conditioned on clearly disclosed pre-set objective metrics.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
4	Increase Authorized Common Stock	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The proposed increase in the number of authorized shares of common stock is reasonable, and there are no substantial concerns about the company's past use of shares.</i>							
5	Amend Right to Call Special Meeting	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The one-year holding period is not especially problematic and provides a reasonable safeguard against abuse of the right.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		70	70
Total Shares:						70	70

Thermo Fisher Scientific Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: TMO	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1951938	
Primary Security ID: 883556102	Primary CUSIP: 883556102	Primary ISIN: US8835561023	Primary SEDOL: 2886907

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Total Ballots: 1

Voting Policy: UUA

Votable Shares: 11

***Shares on Loan: 0**

Shares Instructed: 11

Shares Voted: 11

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marc N. Casper	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Nelson J. Chai	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1c	Elect Director Ruby R. Chandy	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1d	Elect Director C. Martin Harris	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1e	Elect Director Tyler Jacks	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Jennifer M. Johnson	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director R. Alexandra Keith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Karen S. Lynch	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director James C. Mullen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Debora L. Spar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Scott M. Sperling	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Dion J. Weisler	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Despite lowering year-over-year targets in the STI program, target bonus opportunities were not commensurately lowered and payouts were earned well-above target. The LTI program also largely utilizes one-year performance periods as well as an identical metric from the STI program. Further, a majority of non-CEO NEO equity was in time-vesting equity. Executives also received a one-time award and, though the award was entirely in multi-year performance equity, a portion could be earned based on one-year performance.</i>						

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Thermo Fisher Scientific Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 27.39 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i></p>							
4	Amend Right to Call Special Meeting	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. There appears to be no compelling reason to support this shareholder proposal as the one-year holding period is not especially problematic and provides a reasonable safeguard against abuse of the special meeting right.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/02/2025	Auto-Approved 05/02/2025		11	11
Total Shares:						11	11

Xcel Energy Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: XEL	Proxy Level: 3
Record Date: 03/24/2025	Meeting Type: Annual	Meeting ID: 1952358	
Primary Security ID: 98389B100	Primary CUSIP: 98389B100	Primary ISIN: US98389B1008	Primary SEDOL: 2614807
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 130	*Shares on Loan: 0	Shares Instructed: 130	Shares Voted: 130

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Megan Burkhart	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Lynn Casey	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Bob Frenzel	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Netha Johnson	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Patricia Kampling	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director George Kehl	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1g	Elect Director Richard O'Brien	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Xcel Energy Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Charles Pardee	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Charles (Chip) Pardee, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>						
1i	Elect Director James Prokopanko	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Devin Stockfish	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Timothy Welsh	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned at this time and annual incentives and equity awards are primarily based on objective goals. However, in addition to the continuing concerns regarding auto-accelerated equity vesting, investors may expect better disclosure surrounding the ongoing EPS modifier under the STI plan.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/05/2025	Auto-Approved 05/05/2025		130	130
Total Shares:						130	130

DuPont de Nemours, Inc.

Meeting Date: 05/22/2025	Country: USA	Ticker: DD	Proxy Level: 3
Record Date: 03/31/2025	Meeting Type: Annual	Meeting ID: 1949975	
Primary Security ID: 26614N102	Primary CUSIP: 26614N102	Primary ISIN: US26614N1028	Primary SEDOL: BK0VN47
Votable Shares: 57	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 57
	*Shares on Loan: 0	Shares Instructed: 57	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Amy G. Brady	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Edward D. Breen	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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DuPont de Nemours, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Ruby R. Chandy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Terrence R. Curtin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Alexander M. Cutler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Eleuthere I. du Pont	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Kristina M. Johnson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Luther C. Kissam, IV	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Lori D. Koch	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director James A. Lico	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Frederick M. Lowery	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Kurt B. McMaken	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Steven M. Sterin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Some concerns are raised by incomplete goal disclosure in the LTIP. However, the LTI program is majority performance-based and utilizes multi-year metrics with an annual metric that requires year-over-year growth. The company also provided fulsome retroactive goal disclosure for prior cycle PSUs, which vested below target. Also, the annual incentive program is primarily based on financial metrics and fulsome disclosure is provided surrounding the sustainability modifier goals. Additionally, the new CEO's total pay was set below her predecessor's and the additional grants she received were intended to bring her pay to market levels.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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DuPont de Nemours, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/05/2025	Auto-Approved 05/05/2025		57	57
Total Shares:						57	57

EastGroup Properties, Inc.

Meeting Date: 05/22/2025 **Country:** USA **Ticker:** EGP **Proxy Level:** 3
Record Date: 03/21/2025 **Meeting Type:** Annual **Meeting ID:** 1953816
Primary Security ID: 277276101 **Primary CUSIP:** 277276101 **Primary ISIN:** US2772761019 **Primary SEDOL:** 2455761

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 785 ***Shares on Loan:** 0 **Shares Instructed:** 785 **Shares Voted:** 785

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director D. Pike Aloian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director H. Eric Bolton, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Donald F. Colleran	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director David M. Fields	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Marshall A. Loeb	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Mary E. McCormick	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Katherine M. Sandstrom	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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EastGroup Properties, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/05/2025	Auto-Approved 05/05/2025		785	785
Total Shares:						785	785

Insulet Corporation

Meeting Date: 05/22/2025	Country: USA	Ticker: PODD	Proxy Level: 3
Record Date: 03/26/2025	Meeting Type: Annual	Meeting ID: 1966031	
Primary Security ID: 45784P101	Primary CUSIP: 45784P101	Primary ISIN: US45784P1012	Primary SEDOL: B1XGNW4

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 77	*Shares on Loan: 0
	Shares Instructed: 77
	Shares Voted: 77

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jessica Hopfield	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.2	Elect Director Ashley A. McEvoy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Elizabeth H. Weatherman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time. The annual incentive plan is predominantly based on pre-set objective measures. LTI awards are primarily performance-conditioned for the CEO. Nevertheless, concerns are noted regarding the design and disclosure of the PSU program's metrics.</i>							
3	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Ratify Grant Thornton LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpounce Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/07/2025	Auto-Approved 05/07/2025		77	77
Total Shares:						77	77

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Meeting Date: 05/22/2025	Country: USA	Ticker: NEE	Proxy Level: 3
Record Date: 03/25/2025	Meeting Type: Annual	Meeting ID: 1948959	
Primary Security ID: 65339F101	Primary CUSIP: 65339F101	Primary ISIN: US65339F1012	Primary SEDOL: 2328915

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 90	*Shares on Loan: 0
	Shares Instructed: 90
	Shares Voted: 90

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicole S. Arnaboldi	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director James L. Camaren	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Naren K. Gursahaney	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Kirk S. Hachigian	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Maria G. Henry	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director John W. Ketchum	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Amy B. Lane	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Amy Lane, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments. A vote FOR the remaining director nominees is warranted.</i>						
1h	Elect Director Geoffrey S. Martha	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director David L. Porges	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Deborah L. "Dev" Stahlkopf	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director John A. Stall	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Darryl L. Wilson	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.58 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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NextEra Energy, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. The overall complexity of the pay program raises some concern, as the STI program utilizes numerous operational metrics and the LTI program has three different performance vehicles. Additionally, certain STI and LTI disclosure concerns are noted, including lacking disclosure of certain operational goals and closing-cycle performance share achievements. While these issues warrant continued close monitoring, there are mitigating factors for the year in review. The STI program was primarily based on quantified, pre-set goals and the company provides fulsome disclosure of the rationale for each operational metric's selection and goal. Further, the majority of equity awards are granted in performance-conditioned equity, which utilizes a multi-year measurement period, and a portion of which does not provide for above-target vesting.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/09/2025	Auto-Approved 05/09/2025		90	90
Total Shares:						90	90

LyondellBasell Industries N.V.

Meeting Date: 05/23/2025	Country: Netherlands	Ticker: LYB	Proxy Level: N/A
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1951713	
Primary Security ID: N53745100	Primary CUSIP: N53745100	Primary ISIN: NL0009434992	Primary SEDOL: B3SPXZ3
Votable Shares: 187	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 187	Shares Voted: 187

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jacques Aigrain	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Lincoln Benet	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Robin Buchanan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Anthony Chase	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1e	Elect Director Robert Dudley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Claire Farley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Rita Griffin	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Rita Griffin, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>							

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LyondellBasell Industries N.V.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Michael Hanley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Virginia Kamsky	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Bridget Karlin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Albert Manifold	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Peter Vanacker	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Approve Discharge of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted because of the absence of any information about significant and compelling controversies indicating that the directors are not fulfilling their fiduciary duties.</i>						
3	Accept Financial Statements and Statutory Reports	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this routine item is warranted.</i>						
4	Ratify PricewaterhouseCoopers Accountants N.V. as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.20 percent of the fees paid to the auditor are for non-audit purposes.</i>						
5	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.20 percent of the fees paid to the auditor are for non-audit purposes.</i>						
6	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Concern continues to be noted regarding the lack of a disclosed target for one PSU goal. However, annual incentives were primarily based on pre-set financial metrics, and long-term incentives were primarily performance-conditioned.</i>						
7	Authorize Repurchase of Up to 10 Percent of Issued Share Capital	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed repurchase authority appears to be within reasonable limits and no serious concerns are highlighted.</i>						
8	Approve Cancellation of Shares	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Because the cancellation of shares is in shareholders' interests, a vote FOR this proposal is warranted.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/06/2025	Auto-Approved 05/06/2025		187	187
Total Shares:						187	187

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Merck & Co., Inc.

Meeting Date: 05/27/2025	Country: USA	Ticker: MRK	Proxy Level: 3
Record Date: 03/28/2025	Meeting Type: Annual	Meeting ID: 1952964	
Primary Security ID: 58933Y105	Primary CUSIP: 58933Y105	Primary ISIN: US58933Y1055	Primary SEDOL: 2778844

Total Ballots: 2	Voting Policy: UUA
Votable Shares: 3,464	*Shares on Loan: 0
	Shares Instructed: 3,464
	Shares Voted: 3,464

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Douglas M. Baker, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Mary Ellen Coe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Pamela J. Craig	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Robert M. Davis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Thomas H. Glocer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1f	Elect Director Surendralal "Lal" L. Karsanbhai	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Risa J. Lavizzo-Mourey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Stephen L. Mayo	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Paul B. Rothman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Patricia F. Russo	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Christine E. Seidman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Inge G. Thulin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Kathy J. Warden	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Merck & Co., Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned for the year under review. Moreover, though some concerns are noted, payouts under the STI and PSU programs are commensurate with recent and longer-term company performance and shareholder outcomes.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.59 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Report on a Human Rights Impact Assessment	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Adoption of the proposal would serve to further strengthen the company's commitment to human rights, as well as augment its existing human rights-related oversight mechanisms, and thus help safeguard the company's reputation and long-term shareholder value.</i></p>							
5	Publish Tax Transparency Report	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed GRI Tax Standard would enhance the company's transparency in communicating its tax practices to investors globally.</i></p>							
6	Consider Eliminating DEI Goals from Compensation Plan Incentives	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The C&M Committee has an established oversight role and it provides comprehensive disclosures regarding its practices, including determining the appropriate metrics and considerations for executive pay decisions.</i></p>							
7	Report on Risks of Discriminating Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this resolution is warranted as the company provides adequate disclosures potential risks related to its advertising and non-discrimination policies.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/08/2025	Auto-Approved 05/08/2025		55	55
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/08/2025	Auto-Approved 05/08/2025		3,409	3,409
Total Shares:						3,464	3,464

iRhythm Technologies, Inc.

Meeting Date: 05/28/2025	Country: USA	Ticker: IRTC	Proxy Level: 3
Record Date: 04/03/2025	Meeting Type: Annual	Meeting ID: 1956641	
Primary Security ID: 450056106	Primary CUSIP: 450056106	Primary ISIN: US4500561067	Primary SEDOL: BYT4ST5

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 1,225

***Shares on Loan: 0**

Shares Instructed: 1,225

Shares Voted: 1,225

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director C. Noel Bairey Merz	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Quentin Blackford	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Bruce Bodaken	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee chair Bruce Bodaken given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the governing documents which adversely impacts shareholder rights.</i>							
1.4	Elect Director Karen Ling	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Mark Rubash	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Ralph Snyderman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Abhijit Talwalkar	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.8	Elect Director Brian Yoor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the compensation committee demonstrated sufficient responsiveness to shareholder concerns following last year's failed say-on-pay vote result. In addition, although some concerns are noted, pay and performance are reasonably aligned at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/08/2025	Auto-Approved 05/08/2025		1,225	1,225
Total Shares:						1,225	1,225

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Penumbra, Inc.

Meeting Date: 05/28/2025	Country: USA	Ticker: PEN	Proxy Level: 3
Record Date: 03/31/2025	Meeting Type: Annual	Meeting ID: 1956896	
Primary Security ID: 70975L107	Primary CUSIP: 70975L107	Primary ISIN: US70975L1070	Primary SEDOL: BZ0V201
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 355	*Shares on Loan: 0	Shares Instructed: 355	Shares Voted: 355

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Janet Leeds	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Thomas Wilder	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.</i>						
4	Declassify the Board of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as it enhances board accountability to shareholders and demonstrates a commitment to shareholders' interests on the part of management.</i>						
5	Eliminate Supermajority Vote Requirements	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirements would improve shareholder rights.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		355	355
Total Shares:						355	355

FTAI Aviation Ltd.

Meeting Date: 05/29/2025	Country: Cayman Islands	Ticker: FTAI	Proxy Level: N/A
Record Date: 04/01/2025	Meeting Type: Annual	Meeting ID: 1956885	
Primary Security ID: G3730V105	Primary CUSIP: G3730V105	Primary ISIN: KYG3730V1059	Primary SEDOL: BLKFTK4

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

FTAI Aviation Ltd.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 776

***Shares on Loan:** 0

Shares Instructed: 776

Shares Voted: 776

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Paul R. Goodwin	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.2	Elect Director Ray M. Robinson	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
5	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.68 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/14/2025	Auto-Approved 05/14/2025		776	776
Total Shares:						776	776

Glaukos Corporation

Meeting Date: 05/29/2025

Country: USA

Ticker: GKOS

Proxy Level: 3

Record Date: 04/04/2025

Meeting Type: Annual

Meeting ID: 1956207

Primary Security ID: 377322102

Primary CUSIP: 377322102

Primary ISIN: US3773221029

Primary SEDOL: BYMWL19

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 888

***Shares on Loan:** 0

Shares Instructed: 888

Shares Voted: 888

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mark J. Foley	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Mark Foley and Gilbert (Gil) Kliman given the board's failure to remove, or subject to a reasonable sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominee, David Hoffmeister, is warranted.</i>							

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Glaukos Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director David F. Hoffmeister	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Gilbert H. Kliman	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Mark Foley and Gilbert (Gil) Kliman given the board's failure to remove, or subject to a reasonable sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominee, David Hoffmeister, is warranted.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		888	888
Total Shares:						888	888

Novanta Inc.

Meeting Date: 05/29/2025	Country: Canada	Ticker: NOV7	Proxy Level: 3
Record Date: 04/15/2025	Meeting Type: Annual	Meeting ID: 1943535	
Primary Security ID: 67000B104	Primary CUSIP: 67000B104	Primary ISIN: CA67000B1040	Primary SEDOL: BD8S5H8
Votable Shares: 662	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 662	Shares Voted: 662

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Lonny J. Carpenter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1B	Elect Director Matthijs Glastra	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1C	Elect Director Barbara B. Hulit	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1D	Elect Director R. Matthew Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Novanta Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1E	Elect Director Mary Kay Ladone	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1F	Elect Director Maxine L. Mauricio	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1G	Elect Director Thomas N. Secor	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1H	Elect Director Darlene J.S. Solomon	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1I	Elect Director Frank A. Wilson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							
3	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.02 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/08/2025	Auto-Approved 05/08/2025		662	662
Total Shares:						662	662

UnitedHealth Group Incorporated

Meeting Date: 06/02/2025	Country: USA	Ticker: UNH	Proxy Level: 3
Record Date: 04/04/2025	Meeting Type: Annual	Meeting ID: 1958884	
Primary Security ID: 91324P102	Primary CUSIP: 91324P102	Primary ISIN: US91324P1021	Primary SEDOL: 2917766
Votable Shares: 88	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 88	Shares Voted: 88

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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UnitedHealth Group Incorporated

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Timothy Flynn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Paul Garcia	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Kristen Gil	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Stephen Hemsley	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Michele Hooper	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director F. William McNabb, III	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Valerie Montgomery Rice	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director John Noseworthy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Andrew Witty *Withdrawn Resolution*	Mgmt	No				
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. On May 14, 2025, the company filed a Form 8-K announcing that CEO Andrew Witty stepped down from his position on May 12, 2025, and the board appointed non-executive chair and former CEO Stephen Hemsley as the new CEO and board chair. Hemsley's initial compensation arrangements as disclosed in the Form 8-K include a one-time grant of stock options valued at \$60 million that cliff vest after three years, and the company discloses that he will not receive additional annual equity awards in his first three years of employment. The award raises significant concern: front-loaded awards intended to cover multiple years of incentive pay limit the board's ability to meaningfully adjust future pay opportunities in the event of unforeseen circumstances or changes in performance or strategic focus. In this case, the award lacks any performance conditions and prevents the compensation committee from granting the new CEO performance-based equity for three years. Shareholders may additionally have concerns with the timing of the grant: a large option award granted at a time when the stock price has sharply declined has the potential to result in a windfall for the CEO upon a rebound in the share price.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 10.33 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Submit Severance Agreement to Shareholder Vote	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company maintains a policy prohibiting the payment of cash severance in excess of 2.99 times base salary and target bonus. Further, the company's severance arrangements are reasonable, and there have been no recent severance controversies identified.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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UnitedHealth Group Incorporated

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/22/2025	Auto-Approved 05/22/2025		88	88
Total Shares:						88	88

Warner Bros. Discovery, Inc.

Meeting Date: 06/02/2025	Country: USA	Ticker: WBD	Proxy Level: 3
Record Date: 04/04/2025	Meeting Type: Annual	Meeting ID: 1960063	
Primary Security ID: 934423104	Primary CUSIP: 934423104	Primary ISIN: US9344231041	Primary SEDOL: BM8JYX3

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 31	*Shares on Loan: 0
	Shares Instructed: 31
	Shares Voted: 31

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Samuel A. Di Piazza, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Richard W. Fisher	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Paul A. Gould	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.4	Elect Director Debra L. Lee	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.5	Elect Director Joseph M. Levin	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.6	Elect Director Anton J. Levy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Kenneth W. Lowe	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Fazal F. Merchant	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Anthony J. Noto	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.10	Elect Director Paula A. Price	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Warner Bros. Discovery, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.11	Elect Director Daniel E. Sanchez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.12	Elect Director Geoffrey Y. Yang	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.13	Elect Director David M. Zaslav	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.76 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels. A vote AGAINST this proposal is further warranted due to the below concerns: - The committee only demonstrated limited responsiveness to a second consecutive year of low say-on-pay vote support, as multiple changes made in response to shareholder feedback do not apply to the CEO and there is no disclosure indicating that shareholder feedback was limited to non-CEO NEO compensation; - CEO Zaslav, as well as two other NEOs, receive outsized base salaries, while Zaslav's target bonus opportunity is also relatively large; - There are goal rigor concerns in the short- and long-term programs, as financial metrics in both programs utilized performance targets that were set below the prior year's actual performance; and - Zaslav's equity grant was largely based on the compensation committee's discretionary assessment of strategic metrics and was only based on a one-year performance period.</i>							
4	Provide Right to Call Special Meeting	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Vote FOR this proposal as it would represent an enhancement to shareholder's rights.</i>							
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The purchase price is reasonable; - The number of shares reserved is reasonable; and - The offer period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/14/2025	Auto-Approved 05/14/2025		31	31
Total Shares:						31	31

Watsco, Inc.

Meeting Date: 06/02/2025	Country: USA	Ticker: WSO	Proxy Level: 3
Record Date: 04/04/2025	Meeting Type: Annual	Meeting ID: 1962254	
Primary Security ID: 942622200	Primary CUSIP: 942622200	Primary ISIN: US9426222009	Primary SEDOL: 2943039

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 2

*Shares on Loan: 0

Shares Instructed: 2

Shares Voted: 2

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Gary L. Tapella	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board is not majority independent.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		2	2
Total Shares:						2	2

ACI Worldwide, Inc.

Meeting Date: 06/03/2025

Country: USA

Ticker: ACIW

Proxy Level: 3

Record Date: 04/08/2025

Meeting Type: Annual

Meeting ID: 1958489

Primary Security ID: 004498101

Primary CUSIP: 004498101

Primary ISIN: US0044981019

Primary SEDOL: 2889155

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 3,244

*Shares on Loan: 0

Shares Instructed: 3,244

Shares Voted: 3,244

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Adalio T. Sanchez	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.2	Elect Director Juan A. Benitez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Janet O. Estep	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Mary P. Harman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Katrinka B. McCallum	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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ACI Worldwide, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director Charles E. Peters, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Thomas W. Warsop, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Samir M. Zabaneh	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 17.39 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/13/2025	Auto-Approved 05/13/2025		3,244	3,244
Total Shares:						3,244	3,244

Casella Waste Systems, Inc.

Meeting Date: 06/05/2025	Country: USA	Ticker: CWST	Proxy Level: 3
Record Date: 04/09/2025	Meeting Type: Annual	Meeting ID: 1958200	
Primary Security ID: 147448104	Primary CUSIP: 147448104	Primary ISIN: US1474481041	Primary SEDOL: 2120490
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,753	*Shares on Loan: 0	Shares Instructed: 1,753	Shares Voted: 1,753

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael K. Burke	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse. WITHHOLD votes are warranted for Governance Committee member Michael Burke for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>							
1.2	Elect Director Douglas R. Casella	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.3	Elect Director Gary Sovia	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							

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Casella Waste Systems, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although a concern is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							
3	Ratify RSM US LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/20/2025	Auto-Approved 05/20/2025		1,753	1,753
Total Shares:						1,753	1,753

Lyft, Inc.

Meeting Date: 06/05/2025	Country: USA	Ticker: LYFT	Proxy Level: 3
Record Date: 04/22/2025	Meeting Type: Annual	Meeting ID: 1973986	
Primary Security ID: 55087P104	Primary CUSIP: 55087P104	Primary ISIN: US55087P1049	Primary SEDOL: BJT1RW7
Votable Shares: 143	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 143	Shares Voted: 143

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Management Nominee Director Sean Aggarwal	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes are warranted for Governance Committee members Prashant (Sean) Aggarwal and Betsey Stevenson given the board's failure to remove, or subject to a sunset requirement, the classified board, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights, and for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1b	Elect Management Nominee Director Jill Beggs	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Management Nominee Director Ariel Cohen *Withdrawn Resolution*	Mgmt	No				
1d	Elect Management Nominee Director Betsey Stevenson	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Prashant (Sean) Aggarwal and Betsey Stevenson given the board's failure to remove, or subject to a sunset requirement, the classified board, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights, and for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Dissident Nominee Director Alan L. Bazaar *Withdrawn Resolution*	Mgmt	No				
1f	Elect Dissident Nominee Director Daniel B. Silvers *Withdrawn Resolution*	Mgmt	No				
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.53 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. CEO pay declined significantly, following a sizable, front-loaded performance grant in FY23. CEO Risher did not receive an equity award in FY24, and is not expected to receive additional equity awards during the first four years of his employment. The CEO's annual bonus was based on pre-set financial metrics, and below-target payouts align with recent performance. Further, the annual LTI for other NEOs is half performance-based, and PSUs utilize relatively rigorous stock price goals. While there is some concern surrounding a promotion award to one NEO that was primarily time-based, the performance portion of the award is clearly disclosed and relatively rigorous.</i>							
4	Commission Third Party Human Risk Assessment Regarding Use of Artificial Intelligence	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The requested independent human rights risk assessment of the company's use of AI would enable shareholders to more fully evaluate how the company is managing related risks. Additionally, the company lacks adequate human rights due diligence disclosures.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/26/2025	Auto-Approved 05/26/2025		143	143
Total Shares:						143	143

Semtech Corporation

Meeting Date: 06/05/2025	Country: USA	Ticker: SMTC	Proxy Level: 3
Record Date: 04/11/2025	Meeting Type: Annual	Meeting ID: 1961543	
Primary Security ID: 816850101	Primary CUSIP: 816850101	Primary ISIN: US8168501018	Primary SEDOL: 2795542
Votable Shares: 2,287	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 2,287	Shares Voted: 2,287

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Martin S.J. Burvill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Rodolpho C. Cardenuto	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Semtech Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Gregory M. Fischer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Saar Gillai	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Hong Q. Hou	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Ye Jane Li	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.7	Elect Director Paula LuPriore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Julie G. Ruehl	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Paul V. Walsh, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 12.25 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The annual bonus was based entirely on financial metrics, while targets appear to be rigorous. Though some concern is noted in the LTI program with regards to its overlapping metrics with the STI program and annualized performance periods, the equity award is half in performance-conditioned equity, while pay outcomes were generally in line with performance for the year in review.</i>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		2,287	2,287
Total Shares:						2,287	2,287

Varonis Systems, Inc.

Meeting Date: 06/05/2025	Country: USA	Ticker: VRNS	Proxy Level: 3
Record Date: 04/10/2025	Meeting Type: Annual	Meeting ID: 1959642	
Primary Security ID: 922280102	Primary CUSIP: 922280102	Primary ISIN: US9222801022	Primary SEDOL: BJZ2ZR5

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Varonis Systems, Inc.

Total Ballots: 1		Voting Policy: UUA					
Votable Shares: 3,764		*Shares on Loan: 0		Shares Instructed: 3,764		Shares Voted: 3,764	
Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Carlos Aued	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.2	Elect Director Kevin Comolli	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.3	Elect Director John J. Gavin, Jr.	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.4	Elect Director Fred van den Bosch	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Kost Forer Gabbay & Kasierer as Auditors	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 39.30 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>							
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the purchase price and the number of shares reserved are reasonable, and the offering period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							
5	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		3,764	3,764
Total Shares:						3,764	3,764

Walmart Inc.

Meeting Date: 06/05/2025	Country: USA	Ticker: WMT	Proxy Level: 3
Record Date: 04/11/2025	Meeting Type: Annual	Meeting ID: 1961782	
Primary Security ID: 931142103	Primary CUSIP: 931142103	Primary ISIN: US9311421039	Primary SEDOL: 2936921

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 2

Voting Policy: UUA

Votable Shares: 7,537

*Shares on Loan: 0

Shares Instructed: 7,537

Shares Voted: 7,537

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cesar Conde	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Timothy P. Flynn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Sarah J. Friar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Carla A. Harris	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1e	Elect Director Thomas W. Horton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Marissa A. Mayer	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director C. Douglas McMillon	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Robert E. Moritz, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Brian Niccol	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Gregory B. Penner	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST Board Chair Gregory (Greg) Penner is warranted in light of significant concerns raised by shareholders regarding board oversight of risks related to labor controversies and wage concerns.</i>						
1k	Elect Director Randall L. Stephenson	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the incumbent chair of the committee responsible for climate risk oversight, Randall Stephenson, is warranted because the company is not aligned with investor expectations on Net Zero by 2050 targets and commitments.</i>						
1l	Elect Director Steuart L. Walton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not disclosed equity award arrangements in connection with a change in control.</i></p>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i></p>							
5	Commission Third Party Assessment on Policies Regarding Law Enforcement Information Requests Related to Medication Use	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the requested disclosure would provide shareholders with a more comprehensive understanding of how the company oversees and manages risks related to data privacy, particularly in relation to medication use.</i></p>							
6	Report on Reduction of Plastic Packaging and Recyclability Claims	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional disclosure on the company's sustainable packaging efforts would allow shareholders to better assess the company's management of related risks.</i></p>							
7	Revisit Plastic Packaging Policies	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted, as the requested report does not appear to be beneficial for shareholder value.</i></p>							
8	Conduct and Report a Third-Party Racial Equity Audit	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this resolution is warranted, as the requested disclosure of an independent racial equity audit would allow shareholders to better assess the effectiveness of the company's policies and practices.</i></p>							
9	Report on Delays in Revising Diversity, Equity, and Inclusion (DEI) Initiatives	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The requested report does not appear to be beneficial for shareholder value.</i></p>							
10	Report on Health and Safety Governance	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: The requested report on health and safety governance would help shareholders evaluate the effectiveness of the company's workplace safety policies, practices, and management of related risks (Item 10).</i></p>							
11	Report on Risks of Discriminating Based on Religious and Political Views	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company provides sufficient disclosure regarding its ethics and values, including building trust through integrity. In addition, the Audit Committee provides board-level oversight of ethics and compliance.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		210	210

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Walmart Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		7,327	7,327
Total Shares:						7,537	7,537

Alphabet Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: GOOGL	Proxy Level: 2
Record Date: 04/08/2025	Meeting Type: Annual	Meeting ID: 1962910	
Primary Security ID: 02079K305	Primary CUSIP: 02079K305	Primary ISIN: US02079K3059	Primary SEDOL: BYVY8G0

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 100	*Shares on Loan: 0
Shares Instructed: 100	Shares Voted: 100

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Larry Page	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: The nominee attended less than 75% of the board and committee meetings. - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i></p>							
1b	Elect Director Sergey Brin	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Sundar Pichai	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director John L. Hennessy	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i></p>							
1e	Elect Director Frances H. Arnold	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i></p>							
1f	Elect Director R. Martin "Marty" Chavez	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director L. John Doerr	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i>						
1h	Elect Director Roger W. Ferguson, Jr.	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1i	Elect Director K. Ram Shriram	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i>						
1j	Elect Director Robin L. Washington	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. - A vote AGAINST Governance Committee members John Hennessy and Frances Arnold is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST incumbent compensation committee members John Doerr, K. Ram Shriram, and Robin Washington is warranted due to executive compensation concerns, in the absence of a say-on-pay proposal on the ballot. - A vote FOR the remaining director nominees is warranted.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 34.52 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>						
3	Provide Right to Act by Written Consent	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted given that the ability to act by written consent would be detrimental to unaffiliated shareholders.</i>						
4	Adjust Executive Compensation Metrics for Share Buybacks	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The impacts of buybacks on metric results do not raise significant concerns at this time and, as such, performance metrics are best left to directors' discretion.</i>						
5	Report on Discrimination in Charitable Contributions	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company maintains internal governance and approval processes for its contributions to third-party organizations, discloses substantial contributions, upholds a policy prohibiting discrimination, and has established oversight mechanisms.</i>						
6	Consider Ending Participation in Human Rights Campaign's Corporate Equality Index	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the resolution is warranted. The company appears to provide shareholders with sufficient information to evaluate its oversight of the risks associated with its participation in and engagement with certain organizations.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
7	Report on Meeting 2030 Climate Goals	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Additional information on how the company plans to reasonably achieve its 2030 targets with its current related resource commitments would further enable shareholders to monitor the company's progress. Moreover, the requested report would help investors better understand how the company is managing and mitigating climate change-related risks.</i></p>							
8	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted as it would convey to the board nonaffiliated shareholders' preference for a capital structure in which the levels of economic ownership and voting power are aligned.</i></p>							
9	Report on Due Diligence Process to Assess Human Rights Risks in High-Risk Countries	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: see screen note</i></p>							
10	Report on Risks of Discrimination in GenAI	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. While there is a need for transparency around the company's management of risks related to GenAI, shareholder concerns would be better addressed in the proposal under Item 11, as the request for a report assessing the ethics and management of risks related to the company's development of GenAI more comprehensively addresses shareholder concerns.</i></p>							
11	Report on Risks of Improper Use of External Data in Development of AI Products	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. The potential benefit of additional reporting appears prudent given the company acknowledges the risks related to AI technologies and because there appears to be an increased regulatory focus in many of the jurisdictions in which the company operates.</i></p>							
12	Publish a Human Rights Impact Assessment of AI Driven Targeted Advertising	SH	Yes	Against	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as an independent human rights impact assessment would build trust in the company's ability to address potential risks associated with its AI-driven advertising practices, particularly amid a recent data privacy settlement.</i></p>							
13	Report on Lobbying and Child Safety Online	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Additional reporting would ensure the alignment of the company's lobbying practices and efforts with its stated commitments on online safety and harm reduction for children. In addition, the requested report would further provide information for shareholders to effectively assess how the company is managing related risks.</i></p>							
14	Adopt Metrics Evaluating YouTube Child Safety Policies	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional disclosure on how the company measures and tracks metrics related to child safety on the company's platforms would give shareholders more information on how well the company is managing related risks.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/23/2025	Auto-Approved 05/23/2025		100	100
Total Shares:						100	100

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Alphabet Inc.

Axsome Therapeutics, Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: AXSM	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1962990	
Primary Security ID: 05464T104	Primary CUSIP: 05464T104	Primary ISIN: US05464T1043	Primary SEDOL: BYZR4X4

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 1,076	*Shares on Loan: 0
	Shares Instructed: 1,076
	Shares Voted: 1,076

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Elect Director Roger Jeffs	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Roger Jeffs given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the charter, each of which adversely impacts shareholder rights.</i></p>							
2	Approve Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The equity program is estimated to be excessively dilutive (overriding factor); - The plan cost is excessive; - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i></p>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		1,076	1,076
Total Shares:						1,076	1,076

Surgery Partners, Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: SGRY	Proxy Level: 3
Record Date: 04/08/2025	Meeting Type: Annual	Meeting ID: 1961494	
Primary Security ID: 86881A100	Primary CUSIP: 86881A100	Primary ISIN: US86881A1007	Primary SEDOL: BYTC1B2

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 4,667	*Shares on Loan: 0
	Shares Instructed: 4,667
	Shares Voted: 4,667

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John A. Deane	Mgmt	Yes	For	Withhold	Withhold	Withhold

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Surgery Partners, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Wayne DeVeydt, John Deane, and Teresa DeLuca given the board's failure to remove, or subject to a sunset requirement, the classified board and the pop-up supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1.2	Elect Director Teresa DeLuca	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Wayne DeVeydt, John Deane, and Teresa DeLuca given the board's failure to remove, or subject to a sunset requirement, the classified board and the pop-up supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1.3	Elect Director Wayne S. DeVeydt	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Wayne DeVeydt, John Deane, and Teresa DeLuca given the board's failure to remove, or subject to a sunset requirement, the classified board and the pop-up supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company accelerated the vesting of NEOs' equity awards upon resignation. Acceleration of equity awards in connection with termination of employment that does not appear to be involuntary is a problematic pay practice.</i>						
3	Approve Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive; - The estimated duration of available and proposed shares exceeds six years; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); and - The plan allows broad discretion to accelerate vesting.</i>						
4	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.99 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/21/2025	Auto-Approved 05/21/2025		4,667	4,667
Total Shares:						4,667	4,667

T-Mobile US, Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: TMUS	Proxy Level: 1
Record Date: 04/07/2025	Meeting Type: Annual	Meeting ID: 1958197	
Primary Security ID: 872590104	Primary CUSIP: 872590104	Primary ISIN: US8725901040	Primary SEDOL: B94Q9V0

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 39

*Shares on Loan: 0

Shares Instructed: 39

Shares Voted: 39

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director André Almeida	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent. The nominee is non-independent and sits on a key committee.</i>							
1.2	Elect Director Marcelo Claire	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.3	Elect Director Thomas Dannenfeldt	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.4	Elect Director Srikant M. Datar	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.5	Elect Director Timotheus Höttges	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.6	Elect Director Christian P. Illek	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent. The nominee is non-independent and sits on a key committee.</i>							
1.7	Elect Director James J. Kavanaugh	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.8	Elect Director Raphael Kübler	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent. The nominee is non-independent and sits on a key committee.</i>							
1.9	Elect Director Thorsten Langheim	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.10	Elect Director Dominique Leroy	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent. The nominee is non-independent and sits on a key committee. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.11	Elect Director Letitia A. Long	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.12	Elect Director G. Michael (Mike) Sievert	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
1.13	Elect Director Teresa A. Taylor	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board is not majority independent.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

T-Mobile US, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/22/2025	Auto-Approved 05/22/2025		39	39
Total Shares:						39	39

Green Brick Partners, Inc.

Meeting Date: 06/10/2025	Country: USA	Ticker: GRBK	Proxy Level: 1
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1967223	
Primary Security ID: 392709101	Primary CUSIP: 392709101	Primary ISIN: US3927091013	Primary SEDOL: BS7T2R6
Total Ballots: 1	Voting Policy: UUA		
Votable Shares: 1,251	*Shares on Loan: 0	Shares Instructed: 1,251	Shares Voted: 1,251

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Elizabeth K. Blake	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Harry Brandler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director James R. Brickman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director David Einhorn	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Kathleen Olsen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Richard S. Press	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Lila Manassa Murphy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify RSM US LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.23 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/22/2025	Auto-Approved 05/22/2025		1,251	1,251
Total Shares:						1,251	1,251

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Klaviyo, Inc.

Meeting Date: 06/10/2025	Country: USA	Ticker: KVYO	Proxy Level: 3
Record Date: 04/15/2025	Meeting Type: Annual	Meeting ID: 1960528	
Primary Security ID: 49845K101	Primary CUSIP: 49845K101	Primary ISIN: US49845K1016	Primary SEDOL: BN4JNC6

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 5,052	*Shares on Loan: 0
	Shares Instructed: 5,052
	Shares Voted: 5,052

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ed Hallen	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent director nominees Ed Hallen, Michael Medici, and Roxanne Oulman given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1b	Elect Director Michael Medici	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent director nominees Ed Hallen, Michael Medici, and Roxanne Oulman given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1c	Elect Director Roxanne Oulman	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for incumbent director nominees Ed Hallen, Michael Medici, and Roxanne Oulman given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 19.15 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. A NEO's pay was high due to significant equity awards granted to her in connection with her hiring. In addition, the annual incentives were based solely on financial measures and were earned below target in line with performance and negative discretion in line with company performance.</i>						
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
	<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		5,052	5,052
Total Shares:						5,052	5,052

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Meeting Date: 06/10/2025	Country: USA	Ticker: OGN	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1963020	
Primary Security ID: 68622V106	Primary CUSIP: 68622V106	Primary ISIN: US68622V1061	Primary SEDOL: BLDCC8J4
Votable Shares: 5	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 5	Shares Voted: 5

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kevin Ali	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Carrie S. Cox	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Robert A. Essner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Alan Ezekowitz	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1e	Elect Director Helene Gayle	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Rochelle ("Shelly") B. Lazarus	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Deborah Leone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Philip Ozuah	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Cynthia M. Patton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Grace Puma	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Shalini Sharp	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.16 percent of the fees paid to the auditor are for non-audit purposes.</i>						

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Organon & Co.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
5	Adopt Director Resignation Guideline	SH	Yes	Against	Against	Against	Against

Voting Policy Rationale: A vote AGAINST this proposal is warranted, as there are no recurring issues regarding failed director elections at the company that suggests a mandatory resignation policy is needed.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		5	5
Total Shares:						5	5

RadNet, Inc.

Meeting Date: 06/10/2025	Country: USA	Ticker: RDNT	Proxy Level: 3
Record Date: 04/16/2025	Meeting Type: Annual	Meeting ID: 1963738	
Primary Security ID: 750491102	Primary CUSIP: 750491102	Primary ISIN: US7504911022	Primary SEDOL: B1JNG19
Votable Shares: 1,846	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 1,846
	*Shares on Loan: 0	Shares Instructed: 1,846	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Howard G. Berger	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
1.2	Elect Director A. Gregory Sorensen	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
1.3	Elect Director Laura P. Jacobs	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
1.4	Elect Director Lawrence L. Levitt	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
1.5	Elect Director Gregory E. Spurlock	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
1.6	Elect Director David L. Swartz	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The board does not include at least one minority director.Less than 30% of the board is diverse.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.89 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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RadNet, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/23/2025	Auto-Approved 05/23/2025		1,846	1,846
Total Shares:						1,846	1,846

Roper Technologies, Inc.

Meeting Date: 06/10/2025	Country: USA	Ticker: ROP	Proxy Level: 3
Record Date: 04/16/2025	Meeting Type: Annual	Meeting ID: 1962796	
Primary Security ID: 776696106	Primary CUSIP: 776696106	Primary ISIN: US7766961061	Primary SEDOL: 2749602
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 213	*Shares on Loan: 0	Shares Instructed: 213	Shares Voted: 213

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Shellye L. Archambeau	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Amy Woods Brinkley	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Irene M. Esteves	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1.4	Elect Director L. Neil Hunn	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.5	Elect Director Robert D. Johnson	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.6	Elect Director Thomas P. Joyce, Jr.	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.7	Elect Director John F. Murphy	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.8	Elect Director Laura G. Thatcher	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Roper Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.9	Elect Director Richard F. Wallman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Annual incentives were based on a pre-set financial metric and the majority of long-term incentives are conditioned on performance against forwardly disclosed goals.</i>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.26 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/23/2025	Auto-Approved 05/23/2025		213	213
Total Shares:						213	213

The TJX Companies, Inc.

Meeting Date: 06/10/2025	Country: USA	Ticker: TJX	Proxy Level: 3
Record Date: 04/15/2025	Meeting Type: Annual	Meeting ID: 1967426	
Primary Security ID: 872540109	Primary CUSIP: 872540109	Primary ISIN: US8725401090	Primary SEDOL: 2989301
Votable Shares: 2,324	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 2,324	Shares Voted: 2,324

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jose B. Alvarez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Alan M. Bennett	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Rosemary T. Berkery	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director David T. Ching	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director C. Kim Goodwin	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1f	Elect Director Ernie Herrman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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The TJX Companies, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Amy B. Lane	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Carol Meyrowitz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Jackwyn L. Nemerov	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Charles F. Wagner, Jr.	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.83 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance were reasonably aligned for the year in review, the annual incentive was entirely conditioned on a financial metric, and long-term incentives were primarily performance-conditioned with a multi-year performance period.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		2,324	2,324
			05/23/2025	05/23/2025			
Total Shares:						2,324	2,324

American Airlines Group Inc.

Meeting Date: 06/11/2025	Country: USA	Ticker: AAL	Proxy Level: 4
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1964897	
Primary Security ID: 02376R102	Primary CUSIP: 02376R102	Primary ISIN: US02376R1023	Primary SEDOL: BCV7KT2
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 720	*Shares on Loan: 0	Shares Instructed: 720	Shares Voted: 720

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Adriane M. Brown	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.2	Elect Director John T. Cahill	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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American Airlines Group Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Kathryn (Katie) Farmer	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Matthew J. Hart	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Robert D. Isom	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Susan D. Kronick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Martin H. Nesbitt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Denise M. O'Leary	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Vicente Reynal	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Gregory D. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Douglas M. Steenland	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director Howard Ungerleider	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: The STIP was based entirely on objective metrics, though the large number of metrics results in increased pay program complexity. The LTIP awards were half performance-based with multi-year forward-looking goals disclosed, and the time-based component's vesting schedule has been lengthened for next year's grants. Importantly, CEO total pay decreased substantially. In light of these factors, a vote FOR this proposal is warranted.</i>						
4	Amend Tax Benefit Preservation Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The duration of the NOL pill is reasonable, the value of the NOLs to be protected is material, and there are no significant concerns with the company's governance practices as they relate to this proposal.</i>						
5	Consider Ending Participation in Human Rights Campaign's Corporate Equality Index	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company appears to provide shareholders with information to evaluate its oversight of the risks associated with its participation in and engagement with certain organizations.</i>						

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American Airlines Group Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		720	720
Total Shares:						720	720

Evercore Inc.

Meeting Date: 06/11/2025 **Country:** USA **Ticker:** EVR **Proxy Level:** 3
Record Date: 04/14/2025 **Meeting Type:** Annual **Meeting ID:** 1966112
Primary Security ID: 29977A105 **Primary CUSIP:** 29977A105 **Primary ISIN:** US29977A1051 **Primary SEDOL:** B1BHXZ2

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 730 ***Shares on Loan:** 0 **Shares Instructed:** 730 **Shares Voted:** 730

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Roger C. Altman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Pamela G. Carlton	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Ellen V. Futter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Gail B. Harris	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Robert B. Millard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Willard J. Overlock, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Simon M. Robertson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director John S. Weinberg	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director William J. Wheeler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Sarah K. Williamson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Evercore Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; - Excise tax gross-up provision in agreements; and - The company provides for automatic accelerated vesting of equity awards upon a change in control.</i></p>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		730	730
Total Shares:						730	730

lululemon athletica inc.

Meeting Date: 06/11/2025	Country: USA	Ticker: LULU	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1966046	
Primary Security ID: 550021109	Primary CUSIP: 550021109	Primary ISIN: US5500211090	Primary SEDOL: B23FN39
Votable Shares: 244	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 244
	*Shares on Loan: 0	Shares Instructed: 244	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kathryn Henry	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Alison Loehnis	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1c	Elect Director Jon McNeill	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.61 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; and - High CEO pay relative to company performance compared to the company's peers.</i></p>							

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lululemon athletica inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Report on Discrimination in Charitable Contributions	SH	Yes	Against	Against	Against	Against

Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company provides sufficient disclosure of its philanthropic activities, including strategy, focus, and purpose. No material issues related to the proponent's request have been identified in the preparation of this report. In addition, the company provides disclosure of the structure of the management of its philanthropic activities and related board oversight.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		244	244
Total Shares:						244	244

Pure Storage, Inc.

Meeting Date: 06/11/2025	Country: USA	Ticker: PSTG	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1968009	
Primary Security ID: 74624M102	Primary CUSIP: 74624M102	Primary ISIN: US74624M1027	Primary SEDOL: BYZ62T3
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,510	*Shares on Loan: 0	Shares Instructed: 1,510	Shares Voted: 1,510

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Scott Dietzen	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is non-independent and sits on a key committee. WITHHOLD votes are warranted for Scott Dietzen as Governance Committee member, given the board's failure to remove, or subject to a reasonable sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. In the absence of members of the Compensation Committee on the ballot, WITHHOLD votes are warranted for incumbent director nominees Charles Giancarlo, Scott Dietzen, John Murphy, and Greg Tomb due to the compensation committee's limited responsiveness to last year's failed say-on-pay vote.</i></p>							
1.2	Elect Director Charles Giancarlo	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. In the absence of members of the Compensation Committee on the ballot, WITHHOLD votes are warranted for incumbent director nominees Charles Giancarlo, Scott Dietzen, John Murphy, and Greg Tomb due to the compensation committee's limited responsiveness to last year's failed say-on-pay vote.</i></p>							
1.3	Elect Director John Murphy	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. In the absence of members of the Compensation Committee on the ballot, WITHHOLD votes are warranted for incumbent director nominees Charles Giancarlo, Scott Dietzen, John Murphy, and Greg Tomb due to the compensation committee's limited responsiveness to last year's failed say-on-pay vote.</i></p>							
1.4	Elect Director Greg Tomb	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. In the absence of members of the Compensation Committee on the ballot, WITHHOLD votes are warranted for incumbent director nominees Charles Giancarlo, Scott Dietzen, John Murphy, and Greg Tomb due to the compensation committee's limited responsiveness to last year's failed say-on-pay vote.</i></p>							

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Pure Storage, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 27.37 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The compensation committee demonstrated limited responsiveness to last year's failed say-on-pay vote.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		1,510	1,510
Total Shares:						1,510	1,510

Western Alliance Bancorporation

Meeting Date: 06/11/2025	Country: USA	Ticker: WAL	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1960511	
Primary Security ID: 957638109	Primary CUSIP: 957638109	Primary ISIN: US9576381092	Primary SEDOL: B0CCGJ4
Votable Shares: 1,759	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,759	Shares Voted: 1,759

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bruce D. Beach	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Juan R. Figuereo	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Howard N. Gould	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.4	Elect Director Greta Guggenheim	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.5	Elect Director Christopher A. Halmy	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.6	Elect Director Mary Chris Jammet	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Western Alliance Bancorporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Marianne Boyd Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Mary Tuuk Kuras	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Robert P. Latta	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Anthony T. Meola	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.11	Elect Director Bryan K. Segedi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.12	Elect Director Donald D. Snyder	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.13	Elect Director Kenneth A. Vecchione	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels.</i>							
3	Ratify RSM US LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 5.39 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		1,759	1,759
Total Shares:						1,759	1,759

Exact Sciences Corporation

Meeting Date: 06/12/2025	Country: USA	Ticker: EXAS	Proxy Level: 3
Record Date: 04/15/2025	Meeting Type: Annual	Meeting ID: 1966043	
Primary Security ID: 30063P105	Primary CUSIP: 30063P105	Primary ISIN: US30063P1057	Primary SEDOL: 2719951

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Exact Sciences Corporation

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 150

*Shares on Loan: 0

Shares Instructed: 150

Shares Voted: 150

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael Barber	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Paul Clancy	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Daniel J. Levangie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Kevin Conroy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Shacey Petrovic	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Kimberly Popovits	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1g	Elect Director Katherine S. Zanotti	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The purchase price is reasonable; - The number of shares reserved is reasonable; and - The offer period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Yes	Against	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as there are no recurring issues or company-specific factors that suggest the proponent's more stringent director resignation policy is necessary at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Exact Sciences Corporation

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		150	150
Total Shares:						150	150

GameStop Corp.

Meeting Date: 06/12/2025 **Country:** USA **Ticker:** GME **Proxy Level:** 3
Record Date: 04/21/2025 **Meeting Type:** Annual **Meeting ID:** 1961590
Primary Security ID: 36467W109 **Primary CUSIP:** 36467W109 **Primary ISIN:** US36467W1099 **Primary SEDOL:** BOLLFT5

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 505 ***Shares on Loan:** 0 **Shares Instructed:** 505 **Shares Voted:** 505

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ryan Cohen	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board does not include at least one woman director.Less than 30% of the board is diverse.</i>							
1.2	Elect Director Alain (Alan) Attal	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board does not include at least one woman director.Less than 30% of the board is diverse.</i>							
1.3	Elect Director Lawrence (Larry) Cheng	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board does not include at least one woman director.Less than 30% of the board is diverse.</i>							
1.4	Elect Director James (Jim) Grube	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board does not include at least one woman director.Less than 30% of the board is diverse.</i>							
1.5	Elect Director Nathaniel (Nat) Turner	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The board does not include at least one woman director.Less than 30% of the board is diverse.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		505	505
Total Shares:						505	505

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Generac Holdings Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: GNRC	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1965671	
Primary Security ID: 368736104	Primary CUSIP: 368736104	Primary ISIN: US3687361044	Primary SEDOL: B6197Q2
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 90	*Shares on Loan: 0	Shares Instructed: 90	Shares Voted: 90

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Aaron P. Jagdfeld	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Andrew G. Lampereur	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1.3	Elect Director Nam T. Nguyen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 29.46 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Annual incentives were primarily determined by pre-set financial metrics and, although performance shares lack forwardly disclosed goals, they were targeted to comprise half of the LTIP in FY24.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/28/2025	Auto-Approved 05/28/2025		90	90
Total Shares:						90	90

Ingersoll Rand Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: IR	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1962916	
Primary Security ID: 45687V106	Primary CUSIP: 45687V106	Primary ISIN: US45687V1061	Primary SEDOL: BL5GZ82
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 545	*Shares on Loan: 0	Shares Instructed: 545	Shares Voted: 545

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vicente Reynal	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Ingersoll Rand Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director William P. Donnelly	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1c	Elect Director Jennifer Hartsock	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1d	Elect Director John Humphrey	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1e	Elect Director Marc E. Jones	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director JoAnna L. Sohovich	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>							
1g	Elect Director Mark P. Stevenson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Michelle Swanenburg	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 27.69 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although some concerns are noted, pay is reasonably aligned with performance for the year under review.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		545	545
Total Shares:						545	545

MicroStrategy Incorporated

Meeting Date: 06/12/2025	Country: USA	Ticker: MSTR	Proxy Level: 1
Record Date: 04/22/2025	Meeting Type: Annual	Meeting ID: 1964541	
Primary Security ID: 594972408	Primary CUSIP: 594972408	Primary ISIN: US5949724083	Primary SEDOL: 2974329

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 192

*Shares on Loan: 0

Shares Instructed: 192

Shares Voted: 192

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael J. Saylor	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Michael Saylor, Phong Le, Stephen Graham, Jarrod Patten, and Carl (Rick) Rickertsen given that the company maintains a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1.2	Elect Director Phong Q. Le	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Michael Saylor, Phong Le, Stephen Graham, Jarrod Patten, and Carl (Rick) Rickertsen given that the company maintains a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1.3	Elect Director Brian P. Brooks	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
1.4	Elect Director Jane A. Dietze	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
1.5	Elect Director Stephen X. Graham	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Michael Saylor, Phong Le, Stephen Graham, Jarrod Patten, and Carl (Rick) Rickertsen given that the company maintains a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1.6	Elect Director Jarrod M. Patten	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Michael Saylor, Phong Le, Stephen Graham, Jarrod Patten, and Carl (Rick) Rickertsen given that the company maintains a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1.7	Elect Director Carl J. Rickertsen	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies. In the absence of a formal Governance Committee, WITHHOLD votes are warranted for incumbent director nominees Michael Saylor, Phong Le, Stephen Graham, Jarrod Patten, and Carl (Rick) Rickertsen given that the company maintains a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i></p>							
1.8	Elect Director Gregg J. Winiarski	Mgmt	Yes	For	For	Withhold	Withhold
<p><i>Voting Policy Rationale: Less than 30% of the board is diverse.</i></p>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		192	192
Total Shares:						192	192

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Monolithic Power Systems, Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: MPWR	Proxy Level: 3
Record Date: 04/16/2025	Meeting Type: Annual	Meeting ID: 1966986	
Primary Security ID: 609839105	Primary CUSIP: 609839105	Primary ISIN: US6098391054	Primary SEDOL: B01Z7J1

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 79	*Shares on Loan: 0
	Shares Instructed: 79
	Shares Voted: 79

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Herbert Chang	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Michael Hsing	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Carintia Martinez	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. Concerns are raised regarding high pay opportunities in both incentive programs, which significantly exceed peer and index norms by setting a high maximum cap on the values that can be earned. Further, weightings were not disclosed for the LTI performance share metrics, and the disclosure of upside leverage for the strategic metrics was unclear. In addition, annual incentives paid out near maximum after the sole target was set slightly below the prior year's target and actual performance. Nevertheless, annual incentives were based entirely on a pre-set financial metric, long-term incentive awards were entirely performance-conditioned and pay and performance were reasonably aligned for the year in review.</i>						
4	Declassify the Board of Directors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as a declassified board would improve director accountability to shareholders.</i>						
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the proposed 10 percent ownership threshold for shareholders to call a special meeting would enhance shareholders ability to make use of the right. Additionally, an affirmative vote on this proposal may signal support for modifying certain restrictions the board implemented on special meeting timing and subject matter, which may hinder the effectiveness of the right.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		79	79
			05/30/2025	05/30/2025			
Total Shares:						79	79

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Monster Beverage Corporation

Meeting Date: 06/12/2025	Country: USA	Ticker: MNST	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1962931	
Primary Security ID: 61174X109	Primary CUSIP: 61174X109	Primary ISIN: US61174X1090	Primary SEDOL: BZ07BW4
	Total Ballots: 2	Voting Policy: UUA	
Votable Shares: 1,155	*Shares on Loan: 0	Shares Instructed: 1,155	Shares Voted: 1,155

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney C. Sacks	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Hilton H. Schlosberg	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Mark J. Hall	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Ana Demel	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director James L. Dinkins	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director William "Bill" W. Douglas, III	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Tiffany M. Hall	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Jeanne P. Jackson	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Steven G. Pizula	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Mark S. Vidergauz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 3.66 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Annual incentives were based largely on a pre-set financial objective, and half of LTI grants are performance conditioned.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Monster Beverage Corporation

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		174	174
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		981	981
Total Shares:						1,155	1,155

Norwegian Cruise Line Holdings Ltd.

Meeting Date: 06/12/2025	Country: Bermuda	Ticker: NCLH	Proxy Level: N/A
Record Date: 04/02/2025	Meeting Type: Annual	Meeting ID: 1965476	
Primary Security ID: G66721104	Primary CUSIP: G66721104	Primary ISIN: BMG667211046	Primary SEDOL: B9CGTC3
Votable Shares: 537	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 537
	*Shares on Loan: 0	Shares Instructed: 537	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jose E. Cil	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Harry C. Curtis	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Harry Sommer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Annual incentives were primarily based on a pre-set financial metric and long-term incentives were half performance conditioned, with PSU goals forwardly disclosed and measured over a three-year performance period.</i>							
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							
4	Approve PricewaterhouseCoopers LLP Auditors and Authorize Board to Fix Their Remuneration	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		537	537
Total Shares:						537	537

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Norwegian Cruise Line Holdings Ltd.

Vaxcyte, Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: PCVX	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1964445	
Primary Security ID: 92243G108	Primary CUSIP: 92243G108	Primary ISIN: US92243G1085	Primary SEDOL: BKPVGH6
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 769	*Shares on Loan: 0	Shares Instructed: 769	Shares Voted: 769

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John Furey	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Jacks Lee	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Jacks Lee and Heath Lukatch given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the director nominee, John Furey, is warranted.</i>							
1.3	Elect Director Heath Lukatch	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Jacks Lee and Heath Lukatch given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the director nominee, John Furey, is warranted.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although the annual equity awards primarily consisted of stock options, a retention award granted to the NEOs raises significant concern given the large magnitude of the awards.</i>							
4	Amend Certificate of Incorporation to Allow the Exculpation of Certain Officers	Mgmt	Yes	For	For	For	For

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		769	769
Total Shares:						769	769

Zoom Communications, Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: ZM	Proxy Level: 3
Record Date: 04/14/2025	Meeting Type: Annual	Meeting ID: 1967498	
Primary Security ID: 98980L101	Primary CUSIP: 98980L101	Primary ISIN: US98980L1017	Primary SEDOL: BGSP7M9

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Zoom Communications, Inc.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 529

*Shares on Loan: 0

Shares Instructed: 529

Shares Voted: 529

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director William R. McDermott	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.2	Elect Director Michael Fenger	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>							
1.3	Elect Director Santiago Subotovsky	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: Less than 30% of the board is diverse. WITHHOLD votes are warranted for incumbent Governance Committee member Santiago Subotovsky given the board's failure to remove, or subject to a reasonable sunset requirement, the dual-class capital structure, the classified board structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although a number of incremental positive changes were made to the annual program, the company continues to grant sizeable front-loaded awards to NEOs on a four-year cycle. These awards lack pre-set multi-year performance criteria and can lock in pay levels regardless of company performance.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		529	529
Total Shares:						529	529

Best Buy Co., Inc.

Meeting Date: 06/13/2025

Country: USA

Ticker: BBY

Proxy Level: 3

Record Date: 04/14/2025

Meeting Type: Annual

Meeting ID: 1967513

Primary Security ID: 086516101

Primary CUSIP: 086516101

Primary ISIN: US0865161014

Primary SEDOL: 2094670

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 346

*Shares on Loan: 0

Shares Instructed: 346

Shares Voted: 346

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Corie S. Barry	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Lisa M. Caputo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Best Buy Co., Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director David W. Kenny	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director David C. Kimbell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Mario J. Marte	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Karen A. McLoughlin	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Claudia F. Munce	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Richelle P. Parham	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Steven E. Rendle	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Sima D. Sistani	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Melinda D. Whittington	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.84 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although a concern persists that the relative TSR metric for the performance shares targets merely median performance, half of the long-term incentives are performance based and utilize a multi-year measurement period with forward-looking goals disclosed. Additionally, the annual incentive continued to be based primarily on financial performance.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
5	Provide Right to Act by Written Consent	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company's existing governance practices, which are generally robust, provide an effective counterbalance to the absence of a meaningful right to act by written consent.</i>						
6	Consider Ending Participation in Human Rights Campaign Corporate Equality Index	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company appears to provide shareholders with sufficient information to evaluate its oversight of the risks associated with its participation in and engagement with certain organizations.</i>						

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Best Buy Co., Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
7	Report on LGBTQIA+ Inclusion Efforts	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as it not only aligns with the company's existing DEI efforts but would also allow shareholders to better assess the company's human capital management strategy.</i>							
8	Publish Climate Transition Plan	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as enhanced disclosure would provide shareholders with greater clarity in assessing the effectiveness of its policies and strategies for climate related-risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		346	346
			05/30/2025	05/30/2025			
Total Shares:						346	346

Fortinet, Inc.

Meeting Date: 06/13/2025	Country: USA	Ticker: FTNT	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1962940	
Primary Security ID: 34959E109	Primary CUSIP: 34959E109	Primary ISIN: US34959E1091	Primary SEDOL: B5B2106
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 1,019	*Shares on Loan: 0	Shares Instructed: 1,019	Shares Voted: 1,019

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ken Xie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Michael Xie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Kenneth A. Goldman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Ming Hsieh	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Jean Hu	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Janet Napolitano	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.7	Elect Director William H. Neukom	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Fortinet, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Judith Sim	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director James Stavridis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 14.17 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements. An additional concerns are noted in: - The LTIP surrounding the use of short performance periods for certain PSUs.</i>						
4	Require Independent Board Chair	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although the company has no significant performance or governance concerns, the lead independent director's role is not considered sufficiently robust. As such, shareholder would benefit from the most robust form of independent oversight in the form of an independent chair.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		1,019	1,019
Total Shares:						1,019	1,019

Marvell Technology, Inc.

Meeting Date: 06/13/2025	Country: USA	Ticker: MRVL	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1967400	
Primary Security ID: 573874104	Primary CUSIP: 573874104	Primary ISIN: US5738741041	Primary SEDOL: BNKJSM5
Votable Shares: 1,191	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,191	Shares Voted: 1,191

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sara Andrews	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director W. Tudor Brown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Brad W. Buss	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Marvell Technology, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Daniel Durn	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Rebecca W. House	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Marachel L. Knight	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Matthew J. Murphy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Richard P. Wallace	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A cautionary vote FOR this proposal is warranted given that the compensation committee demonstrated only limited responsiveness to shareholder concerns following last year's low say-on-pay support.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 11.08 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Require Independent Board Chair	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chair of the board.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		1,191	1,191
Total Shares:						1,191	1,191

Shift4 Payments, Inc.

Meeting Date: 06/13/2025	Country: USA	Ticker: FOUR	Proxy Level: 3
Record Date: 04/22/2025	Meeting Type: Annual	Meeting ID: 1966566	
Primary Security ID: 82452J109	Primary CUSIP: 82452J109	Primary ISIN: US82452J1097	Primary SEDOL: BLF0L75

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Shift4 Payments, Inc.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 49

*Shares on Loan: 0

Shares Instructed: 49

Shares Voted: 49

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Christopher N. Cruz	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. WITHHOLD votes are warranted for Sarah Goldsmith-Grover: - for serving as a non-independent member of certain key board committees; - as a Governance Committee member, given the board's failure to remove, or subject to a sunset requirement, the problematic multi-class capital structure and the classified board structure, each of which adversely impacts shareholder rights. WITHHOLD votes are warranted for Audit Committee member Christopher Cruz for concerns regarding risk oversight in light of the pledging of a significant amount of the company's stock. A vote FOR director nominee Seth Dallaire is warranted.</i></p>							
1.2	Elect Director Seth Dallaire	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Sarah Grover	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is non-independent and sits on a key committee. WITHHOLD votes are warranted for Sarah Goldsmith-Grover: - for serving as a non-independent member of certain key board committees; - as a Governance Committee member, given the board's failure to remove, or subject to a sunset requirement, the problematic multi-class capital structure and the classified board structure, each of which adversely impacts shareholder rights. WITHHOLD votes are warranted for Audit Committee member Christopher Cruz for concerns regarding risk oversight in light of the pledging of a significant amount of the company's stock. A vote FOR director nominee Seth Dallaire is warranted.</i></p>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 39.95 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; - The company provides for automatic accelerated vesting of equity awards upon a change in control;</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 05/30/2025	Auto-Approved 05/30/2025		49	49
Total Shares:						49	49

Block, Inc.

Meeting Date: 06/17/2025

Country: USA

Ticker: XYZ

Proxy Level: 3

Record Date: 04/21/2025

Meeting Type: Annual

Meeting ID: 1962811

Primary Security ID: 852234103

Primary CUSIP: 852234103

Primary ISIN: US8522341036

Primary SEDOL: BYNZGK1

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 847

***Shares on Loan: 0**

Shares Instructed: 847

Shares Voted: 847

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jack Dorsey	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Paul Deighton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Neha Narula	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Neha Narula given the board's failure to remove, or subject to a sunset requirement, the dual-class capital structure, the supermajority vote requirement to enact certain changes to the governing documents and the classified board, each of which adversely impact shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 12.76 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The equity program is estimated to be excessively dilutive (overriding factor); - The plan cost is excessive; - The three-year average burn rate is excessive; - The estimated duration of available and proposed shares exceeds six years; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i>							
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that: - The purchase price is reasonable; - The number of shares reserved is reasonable; and - The offer period is within the limits prescribed by Section 423 of the Internal Revenue Code.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		847	847
Total Shares:						847	847

Meeting Date: 06/17/2025

Country: USA

Ticker: MET

Proxy Level: 3

Record Date: 04/21/2025

Meeting Type: Annual

Meeting ID: 1966065

Primary Security ID: 59156R108

Primary CUSIP: 59156R108

Primary ISIN: US59156R1086

Primary SEDOL: 2573209

**Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.*

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 1,210

*Shares on Loan: 0

Shares Instructed: 1,210

Shares Voted: 1,210

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carlos M. Gutierrez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Carla A. Harris	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1c	Elect Director Laura J. Hay	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director R. Glenn Hubbard	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1e	Elect Director Jeh C. Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director William E. Kennard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Michel A. Khalaf	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Diana L. McKenzie	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1i	Elect Director Denise M. Morrison	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Christian Mumenthaler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Mark A. Weinberger	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.59 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although target pay opportunities and component weightings were not disclosed for the annual incentives, the program utilizes a pre-set financial metric. Moreover, long-term incentives are majority performance-conditioned, with forwardly-disclosed goals and vesting capped at target in the event absolute TSR is zero or negative.</i>							

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		1,210	1,210
Total Shares:						1,210	1,210

Pegasystems Inc.

Meeting Date: 06/17/2025	Country: USA	Ticker: PEGA	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1963040	
Primary Security ID: 705573103	Primary CUSIP: 705573103	Primary ISIN: US7055731035	Primary SEDOL: 2675860
Votable Shares: 20	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 20
	*Shares on Loan: 0	Shares Instructed: 20	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alan Trefler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Rohit Ghai	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Peter Gyenes	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Richard Jones	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Christopher Lafond	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Dianne Ledingham	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Sharon Rowlands	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Larry Weber	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives. - The company allows for full board discretion in determining the treatment of outstanding upon a change in control.</i>							

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Pegasystems Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
<p><i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan permits cash buyout of awards without shareholder approval (overriding factor); - The equity program is estimated to be excessively dilutive (overriding factor); - The plan cost is excessive; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i></p>							
4	Increase Authorized Common Stock	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. The proposed increase in the number of authorized shares of common stock is reasonable, and there are no substantial concerns about the company's past use of shares.</i></p>							
5	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 17.79 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		20	20
Total Shares:						20	20

Synchrony Financial

Meeting Date: 06/17/2025	Country: USA	Ticker: SYF	Proxy Level: 3
Record Date: 04/22/2025	Meeting Type: Annual	Meeting ID: 1962815	
Primary Security ID: 87165B103	Primary CUSIP: 87165B103	Primary ISIN: US87165B1035	Primary SEDOL: BP96PS6
Votable Shares: 599	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 599	Shares Voted: 599

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Brian D. Doubles	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1b	Elect Director Fernando Aguirre	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i></p>							
1c	Elect Director Paget L. Alves	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Kamila Chytil	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Daniel Colao	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Synchrony Financial

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Arthur W. Coviello, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Roy A. Guthrie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Jeffrey G. Naylor	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1i	Elect Director P.W. "Bill" Parker	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Laurel J. Richie	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1k	Elect Director Ellen M. Zane	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Following last year's low say-on-pay vote, the compensation committee engaged with investors, disclosed their specific feedback, and took action to address shareholders' expressed concerns. Although some concern is noted regarding the lack of forward-looking PSU goal disclosure, pay programs were primarily performance-based, PSU goals are disclosed retrospectively, and pay and performance were reasonably aligned for the year in review.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		599	599
			06/02/2025	06/02/2025			
Total Shares:						599	599

Trimble Inc.

Meeting Date: 06/17/2025	Country: USA	Ticker: TRMB	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1967193	
Primary Security ID: 896239100	Primary CUSIP: 896239100	Primary ISIN: US8962391004	Primary SEDOL: 2903958
Votable Shares: 296	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 296	Shares Voted: 296

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director James C. Dalton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Trimble Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director Borje Ekholm	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Kaigham (Ken) Gabriel	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Meaghan Lloyd	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Ronald S. Nersesian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Robert G. Painter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Mark S. Peek	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Kara Sprague	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Thomas Sweet	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Johan Wibergh	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance were reasonably aligned for the year in review.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		296	296
Total Shares:						296	296

Autodesk, Inc.

Meeting Date: 06/18/2025	Country: USA	Ticker: ADSK	Proxy Level: 3
Record Date: 04/22/2025	Meeting Type: Annual	Meeting ID: 1968742	
Primary Security ID: 052769106	Primary CUSIP: 052769106	Primary ISIN: US0527691069	Primary SEDOL: 2065159

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 403

*Shares on Loan: 0

Shares Instructed: 403

Shares Voted: 403

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Andrew Anagnost	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Karen Blasing	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director John T. Cahill	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Reid French	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Ayanna Howard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Blake Irving	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Ram R. Krishnan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Stephen Milligan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Rami Rahim	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Stacy J. Smith	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.83 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and company performance were reasonably aligned. Some concerns remain regarding incomplete goal disclosure for both the annual and long-term incentive programs, and the use of one-year measurement periods for a portion of the LTIP. Nevertheless, equity grants are majority performance conditioned and primarily based on financial metrics. Further, starting in FY26, the performance shares will cliff-vest after three years and the relative TSR metric will only be measured by a three-year performance period. Moreover, annual incentives remain entirely based on pre-set financial metrics.</i>							
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpounce Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		403	403
Total Shares:						403	403

Coinbase Global, Inc.

Meeting Date: 06/18/2025	Country: USA	Ticker: COIN	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1962862	
Primary Security ID: 19260Q107	Primary CUSIP: 19260Q107	Primary ISIN: US19260Q1076	Primary SEDOL: BMC9P69
Votable Shares: 250	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 250
	*Shares on Loan: 0	Shares Instructed: 250	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Brian Armstrong	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Brian Armstrong as his ownership of the supervoting shares provides him with voting power control of the company.</i>							
1.2	Elect Director Marc L. Andreessen	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. The nominee attended less than 75% of the board and committee meetings. WITHHOLD votes are warranted for Governance Committee members Marc Andreessen, Frederick (Fred) Ehrsam III, and Gokul Rajaram given the board's failure to remove, or subject to a sunset requirement, the dual-class capital structure, the pop-up classified board structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>							
1.3	Elect Director Paul Clement	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Christa Davies	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Frederick Ernest Ehrsam, III	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is non-independent and sits on a key committee. The nominee attended less than 75% of the board and committee meetings. WITHHOLD votes are warranted for Governance Committee members Marc Andreessen, Frederick (Fred) Ehrsam III, and Gokul Rajaram given the board's failure to remove, or subject to a sunset requirement, the dual-class capital structure, the pop-up classified board structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>							
1.6	Elect Director Kelly A. Kramer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.7	Elect Director Chis Lehane	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Tobias Lütke	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Coinbase Global, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.9	Elect Director Gokul Rajaram	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Marc Andreessen, Frederick (Fred) Ehrsam III, and Gokul Rajaram given the board's failure to remove, or subject to a sunset requirement, the dual-class capital structure, the pop-up classified board structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights.</i>						
1.10	Elect Director Fred Wilson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.66 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company provided the CEO a security-related perquisite, the high value of which was an outlier among the S&P 500 Index, without disclosing sufficient rationale.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpionance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		250	250
Total Shares:						250	250

Comcast Corporation

Meeting Date: 06/18/2025	Country: USA	Ticker: CMCSA	Proxy Level: 3
Record Date: 04/08/2025	Meeting Type: Annual	Meeting ID: 1962485	
Primary Security ID: 20030N101	Primary CUSIP: 20030N101	Primary ISIN: US20030N1019	Primary SEDOL: 2044545
Votable Shares: 6,050	Total Ballots: 2	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 6,050	Shares Voted: 6,050

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kenneth J. Bacon	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. - WITHHOLD votes are warranted for Governance Committee members Kenneth Bacon, Madeline Bell, and Jeffrey Honickman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>						
1.2	Elect Director Thomas J. Baltimore, Jr.	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.3	Elect Director Madeline S. Bell	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: - WITHHOLD votes are warranted for Governance Committee members Kenneth Bacon, Madeline Bell, and Jeffrey Honickman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>						
1.4	Elect Director Louise F. Brady	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Edward D. Breen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Jeffrey A. Honickman	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: - WITHHOLD votes are warranted for Governance Committee members Kenneth Bacon, Madeline Bell, and Jeffrey Honickman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>							
1.7	Elect Director Wonya Y. Lucas	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Asuka Nakahara	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director David C. Novak	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.10	Elect Director Brian L. Roberts	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i>							
3	Amend Nonqualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The plan is sufficiently broad-based and provides a reasonable limit on employee and company-matching contributions.</i>							
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned for the year in review. Although concern exists regarding a lack of goal disclosure in the STI and LTI programs, the STI was largely based on pre-set financial metrics, and the LTI was targeted to be primarily performance-based.</i>							
5	Improve Executive Compensation Program and Policy	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The inclusion of the CEO pay ratio as a guiding principle of executive compensation could allow for more informed and contextual assessments by investors as to whether the company's executive compensation practices are reasonable and fair and aligned with shareholders' long-term interests.</i>							
6	Require Independent Board Chair	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given the importance of having an independent chairman of the board.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed	Auto-Approved		98	98
			06/02/2025	06/02/2025			
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		5,952	5,952
			06/02/2025	06/02/2025			

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CrowdStrike Holdings, Inc.

Meeting Date: 06/18/2025 Country: USA Ticker: CRWD Proxy Level: 1
Record Date: 04/25/2025 Meeting Type: Annual Meeting ID: 1968745
Primary Security ID: 22788C105 Primary CUSIP: 22788C105 Primary ISIN: US22788C1053 Primary SEDOL: BJJP138

Total Ballots: 1 Voting Policy: UUA
Votable Shares: 351 *Shares on Loan: 0 Shares Instructed: 351 Shares Voted: 351

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cary J. Davis	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Laura Schumacher given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. WITHHOLD votes are also warranted for Compensation Committee chair Cary Davis, in the absence of a say-on-pay proposal, given concerns regarding the magnitude of NEOs' annual LTI awards, which appear to be indicative of a pattern of outsized awards. In addition, the lack of disclosed compensation committee rationale behind the magnitude of the LTI awards as well as the structure of these LTI grants are also noted concerns. A vote FOR the remaining director nominee George Kurtz is warranted.</i>						
1.2	Elect Director George Kurtz	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Laura J. Schumacher	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Laura Schumacher given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. WITHHOLD votes are also warranted for Compensation Committee chair Cary Davis, in the absence of a say-on-pay proposal, given concerns regarding the magnitude of NEOs' annual LTI awards, which appear to be indicative of a pattern of outsized awards. In addition, the lack of disclosed compensation committee rationale behind the magnitude of the LTI awards as well as the structure of these LTI grants are also noted concerns. A vote FOR the remaining director nominee George Kurtz is warranted.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 9.70 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		351	351
Total Shares:						351	351

IAC Inc.

Meeting Date: 06/18/2025 Country: USA Ticker: IAC Proxy Level: 3
Record Date: 04/30/2025 Meeting Type: Annual Meeting ID: 1968746
Primary Security ID: 44891N208 Primary CUSIP: 44891N208 Primary ISIN: US44891N2080 Primary SEDOL: BNDYF48

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 3,247

*Shares on Loan: 0

Shares Instructed: 3,247

Shares Voted: 3,247

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Tor R. Braham	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse.</i>						
1b	Elect Director Chelsea Clinton	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1c	Elect Director Barry Diller	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1d	Elect Director Michael D. Eisner	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for incumbent Governance Committee members Michael Eisner and Bonnie Hammer for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>						
1e	Elect Director Bonnie S. Hammer	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. WITHHOLD votes are warranted for incumbent Governance Committee members Michael Eisner and Bonnie Hammer for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision.</i>						
1f	Elect Director Victor A. Kaufman	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse.</i>						
1g	Elect Director Bryan Lourd	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse.</i>						
1h	Elect Director David Rosenblatt	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Maria Seferian	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse.</i>						
1j	Elect Director Alan G. Spoon	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse.</i>						
1k	Elect Director Alexander von Furstenberg	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1l	Elect Director Richard F. Zannino	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: The board does not include at least one minority director. Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements; and - The company provides excise tax gross-up provision in agreements.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		3,247	3,247
Total Shares:						3,247	3,247

Keurig Dr Pepper Inc.

Meeting Date: 06/18/2025	Country: USA	Ticker: KDP	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1962864	
Primary Security ID: 49271V100	Primary CUSIP: 49271V100	Primary ISIN: US49271V1008	Primary SEDOL: BD3W133
Votable Shares: 941	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 941
	*Shares on Loan: 0	Shares Instructed: 941	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Timothy "Tim" Cofer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Robert "Bob" Gamgort	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Oray B. Boston Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Juliette Hickman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Pamela "Pam" Patsley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Debra Sandler	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

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Keurig Dr Pepper Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Robert "Bob" Singer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Mike Van de Ven	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.9	Elect Director Lawson Whiting	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although FY24 long-term incentives lack performance criteria, performance-based PSUs were introduced as a component of the FY25 awards. Moreover, annual incentives were entirely based on pre-set financial metrics.</i>							
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 15.25 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpounce Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/02/2025	Auto-Approved 06/02/2025		941	941
Total Shares:						941	941

PVH Corp.

Meeting Date: 06/18/2025	Country: USA	Ticker: PVH	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1972140	
Primary Security ID: 693656100	Primary CUSIP: 693656100	Primary ISIN: US6936561009	Primary SEDOL: B3V9F12
Votable Shares: 218	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 218	Shares Voted: 218

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jesper Andersen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Ajay Bhalla	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Michael M. Calbert	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Brent Callinicos	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director George Cheeks	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Kate Gulliver	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Stefan Larsson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director G. Penny McIntyre	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Amy McPherson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Judith Amanda Sourry Knox	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 16.33 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		218	218
Total Shares:						218	218

ServiceTitan, Inc.

Meeting Date: 06/18/2025	Country: USA	Ticker: TTAN	Proxy Level: 1
Record Date: 04/23/2025	Meeting Type: Annual	Meeting ID: 1968327	
Primary Security ID: 81764X103	Primary CUSIP: 81764X103	Primary ISIN: US81764X1037	Primary SEDOL: BPGN2Q7
Votable Shares: 1,337	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,337	Shares Voted: 1,337

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Tim Cabral	Mgmt	Yes	For	Withhold	Withhold	Withhold

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. WITHHOLD votes are warranted for William Hsu for the following reasons: - As Governance Committee member, for the board's failure to remove, or subject to a sunset requirement, the classified board structure, multi-class capital structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights; and - For failing to attend at least 75 percent of the total board meetings held during the fiscal year under review without disclosing the reason for the absences. In the absence of a say-on-pay proposal and Compensation Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Ara Mahdessian, Timothy (Tim) Cabral, and William Hsu. Certain NEOs received sizable equity awards, resulting in significantly elevated pay.</i></p>						
1.2	Elect Director William Hsu	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee attended less than 75% of the board and committee meetings. WITHHOLD votes are warranted for William Hsu for the following reasons: - As Governance Committee member, for the board's failure to remove, or subject to a sunset requirement, the classified board structure, multi-class capital structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights; and - For failing to attend at least 75 percent of the total board meetings held during the fiscal year under review without disclosing the reason for the absences. In the absence of a say-on-pay proposal and Compensation Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Ara Mahdessian, Timothy (Tim) Cabral, and William Hsu. Certain NEOs received sizable equity awards, resulting in significantly elevated pay.</i></p>						
1.3	Elect Director Ara Mahdessian	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<p><i>Voting Policy Rationale: Less than 30% of the board is diverse. WITHHOLD votes are warranted for William Hsu for the following reasons: - As Governance Committee member, for the board's failure to remove, or subject to a sunset requirement, the classified board structure, multi-class capital structure, and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights; and - For failing to attend at least 75 percent of the total board meetings held during the fiscal year under review without disclosing the reason for the absences. In the absence of a say-on-pay proposal and Compensation Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Ara Mahdessian, Timothy (Tim) Cabral, and William Hsu. Certain NEOs received sizable equity awards, resulting in significantly elevated pay.</i></p>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.05 percent of the fees paid to the auditor are for non-audit purposes.</i></p>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		1,337	1,337
Total Shares:						1,337	1,337

Vertiv Holdings Co.

Meeting Date: 06/18/2025	Country: USA	Ticker: VRT	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1962071	
Primary Security ID: 92537N108	Primary CUSIP: 92537N108	Primary ISIN: US92537N1081	Primary SEDOL: BL3LWS8
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 608	*Shares on Loan: 0	Shares Instructed: 608	Shares Voted: 608

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David M. Cote	Mgmt	Yes	For	For	Withhold	Withhold

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director Giordano Albertazzi	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1c	Elect Director Joseph J. DeAngelo	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1d	Elect Director Joseph van Dokkum	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. WITHHOLD votes are warranted for Jacob Kotzubei for failing to attend at least 75 percent of the board meetings held during the fiscal year under review without an acceptable reason for the absences. WITHHOLD votes are warranted for Governance Committee chair Joseph van Dokkum given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the charter which adversely impacts shareholder rights.</i>						
1e	Elect Director Roger Fradin	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1f	Elect Director Jakki L. Haussler	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor. The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1g	Elect Director Jacob Kotzubei	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is employed full-time and sits on boards at more than 2 public companies. The nominee attended less than 75% of the board and committee meetings. WITHHOLD votes are warranted for Jacob Kotzubei for failing to attend at least 75 percent of the board meetings held during the fiscal year under review without an acceptable reason for the absences. WITHHOLD votes are warranted for Governance Committee chair Joseph van Dokkum given the board's failure to remove, or subject to a sunset requirement, the supermajority vote requirement to enact certain changes to the charter which adversely impacts shareholder rights.</i>						
1h	Elect Director Matthew Louie	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse.</i>						
1i	Elect Director Edward L. Monser	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
1j	Elect Director Steven S. Reinemund	Mgmt	Yes	For	For	Withhold	Withhold
	<i>Voting Policy Rationale: Less than 30% of the board is diverse. The nominee is an incumbent member of the audit committee and non-audit fees exceed 25% of the aggregate fees paid to the company's external auditor.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - There are excessive differentials between CEO pay and the pay of other named executive officers at the firm; and - There is high CEO pay in relation to company peer group CEO median pay levels.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 40.64 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>						

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Vertiv Holdings Co.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		608	608
Total Shares:						608	608

BJ's Wholesale Club Holdings, Inc.

Meeting Date: 06/19/2025	Country: USA	Ticker: BJ	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1971961	
Primary Security ID: 05550J101	Primary CUSIP: 05550J101	Primary ISIN: US05550J1016	Primary SEDOL: BFNZNF8
Votable Shares: 64	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 64
	*Shares on Loan: 0	Shares Instructed: 64	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Darryl Brown	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.2	Elect Director Dave Burwick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director Bob Eddy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Michelle Gloeckler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Maile Naylor	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Steve Ortega	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Ken Parent	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Chris Peterson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Marie Robinson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Rob Steele	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant concerns were identified at this time.</i>						

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BJ's Wholesale Club Holdings, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.39 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>							
5	Report on Efforts to Reduce GHG Emissions	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. The company lacks targets to reduce GHG emissions, and the requested report would help shareholders better understand how it is addressing climate change related risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpionance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		64	64
Total Shares:						64	64

Delta Air Lines, Inc.

Meeting Date: 06/19/2025	Country: USA	Ticker: DAL	Proxy Level: 3
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1962991	
Primary Security ID: 247361702	Primary CUSIP: 247361702	Primary ISIN: US2473617023	Primary SEDOL: B1W9D46
Votable Shares: 1,742	Total Ballots: 2	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,742	Shares Voted: 1,742

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Edward H. Bastian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Christophe Beck	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Maria Black	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Willie CW Chiang	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Greg Creed	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

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Delta Air Lines, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director David G. DeWalt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Leslie D. Hale	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Christopher A. Hazleton	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Michael P. Huerta	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Judith J. McKenna	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Vasant M. Prabhu	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Sergio A. L. Rial	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director David S. Taylor	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1n	Elect Director Kathy N. Waller	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Pay and performance are reasonably aligned for the year in review. Annual incentives are based on objective metrics. The majority of long-term incentive awards are also performance-based.</i>						
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
4	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 18.36 percent of the fees paid to the auditor are for non-audit purposes.</i>						
5	Provide Right to Act by Written Consent	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the ability to act by written consent would enhance shareholder rights.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		100	100

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Delta Air Lines, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		1,642	1,642
Total Shares:						1,742	1,742

Dollar Tree, Inc.

Meeting Date: 06/19/2025	Country: USA	Ticker: DLTR	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1968574	
Primary Security ID: 256746108	Primary CUSIP: 256746108	Primary ISIN: US2567461080	Primary SEDOL: 2272476

Votable Shares: 255	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 255
	*Shares on Loan: 0	Shares Instructed: 255	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael C. Creedon, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director William W. Douglas, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Cheryl W. Grise	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Daniel J. Heinrich	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Paul C. Hilal	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1f	Elect Director Timothy A. Johnson	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Edward J. Kelly, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Jeffrey G. Naylor	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1i	Elect Director Diane E. Randolph	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Bertram L. Scott	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Dollar Tree, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Stephanie P. Stahl	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although concerns persist regarding the lack of forward-looking goal disclosure for the PSUs, annual incentives are entirely based on pre-set financial metrics, and half of the long-term incentives are targeted to be performance-based, measured over a multi-year period.</i>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the terms of the employee stock purchase plan are considered reasonable.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		255	255
Total Shares:						255	255

BridgeBio Pharma, Inc.

Meeting Date: 06/20/2025	Country: USA	Ticker: BBIO	Proxy Level: 3
Record Date: 04/21/2025	Meeting Type: Annual	Meeting ID: 1966548	
Primary Security ID: 10806X102	Primary CUSIP: 10806X102	Primary ISIN: US10806X1028	Primary SEDOL: BK1KWG8
Votable Shares: 2,388	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 2,388	Shares Voted: 2,388

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Neil Kumar	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Charles Homcy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Douglas A. Dachille	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Douglas (Doug) Dachille and Andrew Lo given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
1.4	Elect Director Ronald J. Daniels	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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BridgeBio Pharma, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Andrew W. Lo	Mgmt	Yes	For	Withhold	Withhold	Withhold
	<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Douglas (Doug) Dachille and Andrew Lo given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Although the annual incentive payout was informed by corporate and individual performance goals and the key achievements were disclosed, the program is entirely discretionary. Additionally, the CEO's base salary was significantly increased and outsized compared to peers, creating an augmenting effect on his target bonus and compounded by benchmarking to much larger peers. Further, the annual LTI refresh grants predominantly consisted of time-based RSUs and the committee awarded large fully time-based retention awards to the NEOs for the second time in three years. Lastly, the company has not disclosed any short- and long-term E&S performance incentives, and has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.</i>						
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.92 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factors: - The plan cost is excessive; - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary); - The plan permits liberal recycling of shares; and - The plan allows broad discretion to accelerate vesting.</i>						
5	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>						
6	Adjourn Meeting	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted given that certain items do not warrant support.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		2,388	2,388
Total Shares:						2,388	2,388

GitLab Inc.

Meeting Date: 06/20/2025	Country: USA	Ticker: GTLB	Proxy Level: 3
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1967502	
Primary Security ID: 37637K108	Primary CUSIP: 37637K108	Primary ISIN: US37637K1088	Primary SEDOL: BMTVT22

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		Total Ballots: 2	Voting Policy: UUA					
Votable Shares: 1,958		*Shares on Loan: 0	Shares Instructed: 1,958				Shares Voted: 1,958	
Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction	
1.1	Elect Director Sytse Sijbrandij	Mgmt	Yes	For	For	For	For	
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>								
1.2	Elect Director Matthew Jacobson	Mgmt	Yes	For	Withhold	Withhold	Withhold	
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Matthew (Matt) Jacobson given the board's failure to remove, or subject to a sunset requirement, the dual-class capital structure, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>								
1.3	Elect Director David Henshall	Mgmt	Yes	For	For	For	For	
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>								
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	Against	Against	
<i>Voting Policy Rationale: A vote AGAINST the ratification of the company's auditor is warranted given that non-audit fees represent 28.62 percent of the total fees received by the auditor during the fiscal year, raising substantial doubts over the independence of the auditor.</i>								
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against	
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The new CEO received a significant one-time award that was largely in time-vesting equity, while the proxy did not disclose target goals for the performance portion, which also utilized a relatively short performance period. Annual LTI grants to other NEOs were entirely in time-vesting equity, while one NEO received a sizeable grant in FY25 with no rationale included in the proxy regarding its size. In addition, the company has not disclosed any short- and long-term E&S performance incentives, and has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.</i>								

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/04/2025	Auto-Approved 06/04/2025		1,831	1,831
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/04/2025	Auto-Approved 06/04/2025		127	127
Total Shares:						1,958	1,958

SharkNinja, Inc.

Meeting Date: 06/20/2025	Country: Cayman Islands	Ticker: SN	Proxy Level: N/A
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1972161	
Primary Security ID: G8068L108	Primary CUSIP: G8068L108	Primary ISIN: KYG8068L1086	Primary SEDOL: BRS7681
Total Ballots: 2		Voting Policy: UUA	
Votable Shares: 1,736	*Shares on Loan: 0	Shares Instructed: 1,736	Shares Voted: 1,736

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark Barrocas	Mgmt	Yes	For	For	For	For

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SharkNinja, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Kathryn J. Barton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Peter Feld	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Chi Kin Max Hui	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Dennis Paul	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Barney Tianhao Wang	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Timothy R. Warner	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 16.16 percent of the fees paid to the auditor are for non-audit purposes.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		1,674	1,674
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		62	62
Total Shares:						1,736	1,736

CarMax, Inc.

Meeting Date: 06/24/2025	Country: USA	Ticker: KMX	Proxy Level: 3
Record Date: 04/17/2025	Meeting Type: Annual	Meeting ID: 1969750	
Primary Security ID: 143130102	Primary CUSIP: 143130102	Primary ISIN: US1431301027	Primary SEDOL: 2983563
Votable Shares: 287	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 287	Shares Voted: 287

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter J. Bensen	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Sona Chawla	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Thomas J. Folliard	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Shira D. Goodman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director David W. McCreight	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director William D. Nash	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Mark F. O'Neil	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Pietro Satriano	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Marcella Shinder	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Mitchell D. Steenrod	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.95 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - High CEO pay relative to company performance compared to the company's peers; and - High CEO pay in relation to company peer group CEO median pay levels.</i>							
4	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed 10 percent ownership threshold for shareholders to call a special meeting would enhance shareholders' ability to make use of the right, and the likelihood of abuse of the right is small.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		287	287
Total Shares:						287	287

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Meeting Date: 06/24/2025	Country: USA	Ticker: DASH	Proxy Level: 3
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1966028	
Primary Security ID: 25809K105	Primary CUSIP: 25809K105	Primary ISIN: US25809K1051	Primary SEDOL: BN13P03

Total Ballots: 1	Voting Policy: UUA
Votable Shares: 558	*Shares on Loan: 0
	Shares Instructed: 558
	Shares Voted: 558

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey Blackburn	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director L. John Doerr	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: - A vote AGAINST Governance Committee members L. John Doerr and Diego Piacentini is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST Andy Fang is warranted as his ownership of supervoting shares as part of a voting agreement provides him with voting power control of the company. - A vote AGAINST Governance Committee chair L. John Doerr is further warranted given the board's failure to remove, or subject to a sunset requirement, the classified board which adversely impacts shareholder rights. - A vote FOR the remaining director nominee is warranted.</i>							
1c	Elect Director Andy Fang	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: - A vote AGAINST Governance Committee members L. John Doerr and Diego Piacentini is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST Andy Fang is warranted as his ownership of supervoting shares as part of a voting agreement provides him with voting power control of the company. - A vote AGAINST Governance Committee chair L. John Doerr is further warranted given the board's failure to remove, or subject to a sunset requirement, the classified board which adversely impacts shareholder rights. - A vote FOR the remaining director nominee is warranted.</i>							
1d	Elect Director Diego Piacentini	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: - A vote AGAINST Governance Committee members L. John Doerr and Diego Piacentini is warranted for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. - A vote AGAINST Andy Fang is warranted as his ownership of supervoting shares as part of a voting agreement provides him with voting power control of the company. - A vote AGAINST Governance Committee chair L. John Doerr is further warranted given the board's failure to remove, or subject to a sunset requirement, the classified board which adversely impacts shareholder rights. - A vote FOR the remaining director nominee is warranted.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.02 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.</i>							
4	Amend Certificate of Incorporation to Reflect Certain Delaware Law Provisions Regarding Officer Exculpation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company is controlled and decisions regarding the company's response to shareholder litigation would be made by a board that lacks accountability to public shareholders.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
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DoorDash, Inc.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/03/2025	Auto-Approved 06/03/2025		558	558
Total Shares:						558	558

Freshpet, Inc.

Meeting Date: 06/24/2025	Country: USA	Ticker: FRPT	Proxy Level: 3
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1966751	
Primary Security ID: 358039105	Primary CUSIP: 358039105	Primary ISIN: US3580391056	Primary SEDOL: BS7K7M9
Votable Shares: 1,211	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 1,211
	*Shares on Loan: 0	Shares Instructed: 1,211	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Olu Beck	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1b	Elect Director David B. Biegger	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Daryl G. Brewster	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director William B. Cyr	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Walter N. George, III	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Jacki S. Kelley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Lauri Kien Kotcher	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1h	Elect Director Timothy R. McLevish	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Leta D. Priest	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1j	Elect Director Joseph E. Scalzo	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Freshpet, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Craig D. Steeneck	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1l	Elect Director David J. West	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although a concerns is noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		1,211	1,211
Total Shares:						1,211	1,211

IDEAYA Biosciences, Inc.

Meeting Date: 06/24/2025	Country: USA	Ticker: IDYA	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1966550	
Primary Security ID: 45166A102	Primary CUSIP: 45166A102	Primary ISIN: US45166A1025	Primary SEDOL: BK0VHF6
Votable Shares: 2,315	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 2,315	Shares Voted: 2,315

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.01	Elect Director Jeffrey L. Stein	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.02	Elect Director Scott W. Morrison	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Scott Morrison given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR Jeffrey Stein is warranted.</i>							

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IDEAYA Biosciences, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/12/2025	Auto-Approved 06/12/2025		2,315	2,315
Total Shares:						2,315	2,315

Mastercard Incorporated

Meeting Date: 06/24/2025	Country: USA	Ticker: MA	Proxy Level: 3
Record Date: 04/25/2025	Meeting Type: Annual	Meeting ID: 1964486	
Primary Security ID: 57636Q104	Primary CUSIP: 57636Q104	Primary ISIN: US57636Q1040	Primary SEDOL: B121557
Votable Shares: 1,648	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,648	Shares Voted: 1,648

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Merit E. Janow	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1b	Elect Director Candido Bracher	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Richard K. Davis	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Julius Genachowski	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Choon Phong Goh	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1f	Elect Director Oki Matsumoto	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1g	Elect Director Michael Miebach	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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Mastercard Incorporated

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Youngme Moon	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Rima Qureshi	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1j	Elect Director Gabrielle Sulzberger	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Harit Talwar	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Lance Uggla	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as pay and performance are reasonably aligned. Concerns remain regarding the significant role of discretion in the STIP and lack of disclosure of forward-looking goals for PSUs in the LTIP. Nevertheless, equity grants are predominantly performance-conditioned and based on financial metrics measured using a multi-year period. Further, starting in 2025, the relative TSR metric of the LTIP will target above-median performance and include a payout cap in the event of negative company TSR.</i>						
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.98 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Amend Certificate of Incorporation to Limit the Liability of Officers	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as the exculpation provision permitted by Delaware law is considered to reasonably balance shareholders' interest in officer accountability with their interest in attracting and retaining qualified officers to serve the company.</i>						
5	Amend Articles of Incorporation to Remove Industry Director Concept	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed amendments are administrative in nature and are not considered problematic.</i>						
6	Amend Certificate of Incorporation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed amendments are administrative in nature and are not considered problematic.</i>						
7	Oversee and Report on a Racial Equity Audit	SH	Yes	Against	Against	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted. While Mastercard has made progress in its diversity, equity, and inclusion efforts, a third-party racial equity audit would enhance transparency and help identify opportunities for improvement supporting the company's long-term commitment to building an inclusive and sustainable digital economy.</i>						
8	Report on Discrimination Risks of Affirmative Action Initiatives	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. The company has clear prohibitions against discrimination based on personal characteristics, including race, and company policy requires that employment-related decisions are based on job qualifications and performance. In addition, the company has established relevant board-level oversight of related risks and risk management.</i>						

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Mastercard Incorporated

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		1,648	1,648
Total Shares:						1,648	1,648

Okta, Inc.

Meeting Date: 06/24/2025	Country: USA	Ticker: OKTA	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1969753	
Primary Security ID: 679295105	Primary CUSIP: 679295105	Primary ISIN: US6792951054	Primary SEDOL: BDFZSP1
Total Ballots: 1	Voting Policy: UUA		
Votable Shares: 167	*Shares on Loan: 0	Shares Instructed: 167	Shares Voted: 167

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jeff Epstein	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes are warranted for Governance Committee member Jeff Epstein for: - failing to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights; and - maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR J. Frederic Kerrest is warranted.</i></p>							
1.2	Elect Director J. Frederic Kerrest	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 7.22 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i></p>							
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<p><i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		167	167
Total Shares:						167	167

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Affirm Holdings, Inc.

Meeting Date: 06/25/2025	Country: USA	Ticker: AFRM	Proxy Level: 4
Record Date: 04/28/2025	Meeting Type: Special	Meeting ID: 1972741	
Primary Security ID: 00827B106	Primary CUSIP: 00827B106	Primary ISIN: US00827B1061	Primary SEDOL: BMF9NM8
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 342	*Shares on Loan: 0	Shares Instructed: 342	Shares Voted: 342

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1	Change State of Incorporation from Delaware to Nevada	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as the potential financial benefits resulting from the reincorporation are not considered to outweigh the potential negative effects to shareholder rights.</i>						
2	Adjourn Meeting	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as the underlying proposal does not merit support.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed	Auto-Approved		342	342
			06/09/2025	06/09/2025			
Total Shares:						342	342

eBay Inc.

Meeting Date: 06/25/2025	Country: USA	Ticker: EBAY	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1967089	
Primary Security ID: 278642103	Primary CUSIP: 278642103	Primary ISIN: US2786421030	Primary SEDOL: 2293819
	Total Ballots: 2	Voting Policy: UUA	
Votable Shares: 5,105	*Shares on Loan: 0	Shares Instructed: 5,105	Shares Voted: 5,105

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Adriane M. Brown	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1b	Elect Director Aparna Chennapragada	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Logan D. Green	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director E. Carol Hayles	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Jamie J. Iannone	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Shripriya Mahesh	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director William D. Nash	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Paul S. Pressler	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Zane Rowe	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Mohak Shroff	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Perry M. Traquina	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 17.73 percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned. Although the PBRsUs utilize a series of annual performance periods and lack forwardly-disclosed goals, they are targeted to constitute a majority of long-term incentives. Moreover, annual incentives were based primarily on a pre-set financial metric.</i>						
4	Amend Omnibus Stock Plan	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: Based on an evaluation of the estimated cost, plan features, and grant practices using the Equity Plan Scorecard (EPSC), a vote AGAINST this proposal is warranted due to the following key factor(s): - The plan cost is excessive - The three-year average burn rate is excessive - The disclosure of change-in-control ("CIC") vesting treatment is incomplete (or is otherwise considered discretionary) - The plan allows broad discretion to accelerate vesting</i>						
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting to 10%	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as the proposed 10 percent ownership threshold for shareholders to call a special meeting would enhance shareholders' ability to make use of the right, and the likelihood of abuse of the right is small.</i>						
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Yes	Against	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as there are no recurring issues or company-specific factors at the company that suggest the proponent's more stringent director resignation policy is necessary at this time.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 06/04/2025	Auto-Approved 06/04/2025		130	130
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/04/2025	Auto-Approved 06/04/2025		4,975	4,975

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NVIDIA Corporation

Meeting Date: 06/25/2025 **Country:** USA **Ticker:** NVDA **Proxy Level:** 3
Record Date: 04/28/2025 **Meeting Type:** Annual **Meeting ID:** 1973102
Primary Security ID: 67066G104 **Primary CUSIP:** 67066G104 **Primary ISIN:** US67066G1040 **Primary SEDOL:** 2379504

Total Ballots: 1 **Voting Policy:** UUA
Votable Shares: 24,500 ***Shares on Loan:** 0 **Shares Instructed:** 24,500 **Shares Voted:** 24,500

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert K. Burgess	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Tench Coxé	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director John O. Dabiri	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Persis S. Drell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Jen-Hsun Huang	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Dawn Hudson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Harvey C. Jones	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Melissa B. Lora	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1i	Elect Director Stephen C. Neal	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Ellen Ochoa	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director A. Brooke Seawell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Aarti Shah	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1m	Elect Director Mark A. Stevens	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						

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NVIDIA Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted. Although some concerns are raised with respect to the LTI plan, CEO pay and company performance are reasonably aligned for the year under review, and the CEO's equity awards are entirely performance-based, with clearly disclosed target goals.</i></p>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because only 12.10 percent of the fees paid to the auditor are for non-audit purposes.</i></p>							
4	Eliminate Supermajority Vote Requirements	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the reduction in the supermajority vote requirement would enhance shareholder rights.</i></p>							
5	Amend Right to Call Special Meeting	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. There appears to be no compelling reason to support this shareholder proposal as the one-year holding period is not especially problematic.</i></p>							
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Yes	Against	Against	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted as there are no recurring issues or company-specific factors at the company that suggest the proponent's more stringent director resignation policy is necessary at this time.</i></p>							
7	Enhance Workforce Data Reporting	SH	Yes	Against	Against	For	For
<p><i>Voting Policy Rationale: A vote FOR this resolution is warranted, as additional diversity-related disclosures would allow shareholders to better assess the effectiveness of the company's existing diversity initiatives and its management of related risks.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpionance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		24,500	24,500
Total Shares:						24,500	24,500

Robinhood Markets, Inc.

Meeting Date: 06/25/2025	Country: USA	Ticker: HOOD	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1963167	
Primary Security ID: 770700102	Primary CUSIP: 770700102	Primary ISIN: US7707001027	Primary SEDOL: BP0TQN6
Votable Shares: 1,002	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 1,002	Shares Voted: 1,002

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Vladimir Tenev	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							

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Robinhood Markets, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director Baiju P. Bhatt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.3	Elect Director John Hegeman	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.4	Elect Director Paula Loop	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.5	Elect Director Meyer Malka	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.6	Elect Director Christopher Payne	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.7	Elect Director Jonathan Rubinstein	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST incumbent Governance Committee members Jonathan Rubinstein and Oluwadara (Dara) Treseder is warranted for maintaining a dual-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i>						
1.8	Elect Director Susan Segal	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1.9	Elect Director Dara Treseder	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST incumbent Governance Committee members Jonathan Rubinstein and Oluwadara (Dara) Treseder is warranted for maintaining a dual-class structure that is not subject to a reasonable time-based sunset provision. A vote FOR the remaining director nominees is warranted.</i>						
1.10	Elect Director Robert Zoellick	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 2.39 percent of the fees paid to the auditor are for non-audit purposes.</i>						

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		1,002	1,002
Total Shares:						1,002	1,002

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

SentinelOne, Inc.

Meeting Date: 06/25/2025	Country: USA	Ticker: S	Proxy Level: 3
Record Date: 04/30/2025	Meeting Type: Annual	Meeting ID: 1973650	
Primary Security ID: 81730H109	Primary CUSIP: 81730H109	Primary ISIN: US81730H1095	Primary SEDOL: BP7L1B8
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 308	*Shares on Loan: 0	Shares Instructed: 308	Shares Voted: 308

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Tomer Weingarten	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Daniel Scheinman	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes are warranted for Governance Committee member Daniel (Dan) Scheinman given the board's failure to remove, or subject to a sunset requirement, the classified board and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR the remaining director nominees is warranted.</i>							
1.3	Elect Director Teddie Wardi	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 22.37 percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. Though the annual bonus program was based on pre-set objective metrics, the performance measure and actual performance for a strategic objective metric is poorly disclosed. A majority of PSUs overlap with the STI program, while a majority of the annual equity grant was in time-vesting equity. Lastly, the proxy does not provide any rationale regarding the CEO's relatively large target equity grant value nor its continued increase.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/10/2025	Auto-Approved 06/10/2025		308	308
Total Shares:						308	308

CoStar Group, Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: CSGP	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1967109	
Primary Security ID: 22160N109	Primary CUSIP: 22160N109	Primary ISIN: US22160N1090	Primary SEDOL: 2262864

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 333

*Shares on Loan: 0

Shares Instructed: 333

Shares Voted: 333

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Louise S. Sams	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Andrew C. Florance	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director John L. Berisford	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Angelique G. Brunner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Rachel C. Glaser	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director John W. Hill	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Christine M. McCarthy	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Robert W. Musslewhite	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>						
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	Against	Against	Against
	<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted. A quantitative pay-for-performance misalignment exists, and sufficient mitigating factors have not been identified for the year in review. The CEO's total pay significantly increased year-over-year due to an increase in the value of his annual equity awards without compelling rationale, and the company's above-median benchmarking approach appears to be contributing to relatively high pay quantum. Furthermore, the LTI program is complex, and forward-looking three-year goals and closing-cycle PSU threshold and maximum goals are not disclosed. The company also maintains a deferral program that provides a generous match. Lastly, the STI target goal was set below the prior year's actual performance without a commensurate reduction in payout opportunities and was achieved at maximum, and PRSUs have been achieved at maximum since at least FY20, raising goal rigor concerns.</i>						
4	Approve Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						
5	Report on Political Contributions	SH	Yes	Against	For	For	For
	<i>Voting Policy Rationale: A vote FOR this resolution is warranted. Additional disclosure would help shareholders more fully evaluate the company's use of corporate funds in the political process and its management of related activities.</i>						

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		333	333
Total Shares:						333	333

Dell Technologies Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: DELL	Proxy Level: 3
Record Date: 04/30/2025	Meeting Type: Annual	Meeting ID: 1974465	
Primary Security ID: 24703L202	Primary CUSIP: 24703L202	Primary ISIN: US24703L2025	Primary SEDOL: BHKD3S6

Total Ballots: 2	Voting Policy: UUA
Votable Shares: 693	*Shares on Loan: 0
Shares Instructed: 693	Shares Voted: 693

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael S. Dell	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Ellen Kullman and David Dorman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are warranted for Michael Dell as his ownership of the supervoting shares provides him with voting power control of the company.</i>							
1.2	Elect Director David W. Dorman	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee members Ellen Kullman and David Dorman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are warranted for Michael Dell as his ownership of the supervoting shares provides him with voting power control of the company.</i>							
1.3	Elect Director Egon Durban	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.4	Elect Director David Grain	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
1.5	Elect Director William D. Green	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Ellen J. Kullman	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies. WITHHOLD votes are warranted for Governance Committee members Ellen Kullman and David Dorman for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are warranted for Michael Dell as his ownership of the supervoting shares provides him with voting power control of the company.</i>							
1.7	Elect Director Steven M. Mollenkopf	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.8	Elect Director Lynn Vojvodich Radakovich	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.98 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Dell Technologies Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against

Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		106	106
Xpionance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		587	587
Total Shares:						693	693

HealthEquity, Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: HQY	Proxy Level: 3
Record Date: 05/07/2025	Meeting Type: Annual	Meeting ID: 1973096	
Primary Security ID: 42226A107	Primary CUSIP: 42226A107	Primary ISIN: US42226A1079	Primary SEDOL: BP8XZL1
Total Ballots: 1	Voting Policy: UUA		
Votable Shares: 2,103	*Shares on Loan: 0	Shares Instructed: 2,103	Shares Voted: 2,103

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert Selander	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Scott Cutler	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Stephen Neeleman	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Adrian Dillon	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Evelyn Dilsaver	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Debra McCowan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Rajesh Natarajan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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HealthEquity, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Stuart Parker	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Gayle Wellborn	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because less than one percent of the fees paid to the auditor are for non-audit purposes.</i>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted as pay and performance are reasonably aligned and no significant issues were identified at this time.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		2,103	2,103
Total Shares:						2,103	2,103

Revolution Medicines, Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: RVMD	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1966123	
Primary Security ID: 76155X100	Primary CUSIP: 76155X100	Primary ISIN: US76155X1000	Primary SEDOL: BL71K91
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 2,299	*Shares on Loan: 0	Shares Instructed: 2,299	Shares Voted: 2,299

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Frank K. Clyburn, Jr.	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Sandra J. Horning	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Sandra Horning, Sushil Patel, and Thilo Schroeder given the board's failure to remove, or subject to a sunset requirement, the classified board structure and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR remaining director nominee, Franklin (Frank) Clyburn Jr., is warranted.</i>							
1.3	Elect Director Sushil Patel	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Sandra Horning, Sushil Patel, and Thilo Schroeder given the board's failure to remove, or subject to a sunset requirement, the classified board structure and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR remaining director nominee, Franklin (Frank) Clyburn Jr., is warranted.</i>							

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Revolution Medicines, Inc.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Thilo Schroeder	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: In the absence of Governance Committee members on the ballot, WITHHOLD votes are warranted for incumbent director nominees Sandra Horning, Sushil Patel, and Thilo Schroeder given the board's failure to remove, or subject to a sunset requirement, the classified board structure and the supermajority vote requirement to enact certain changes to the governing documents, each of which adversely impacts shareholder rights. A vote FOR remaining director nominee, Franklin (Frank) Clyburn Jr., is warranted.</i></p>							
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted because: - The company has not disclosed any short- and long-term E&S performance incentives; and - The company has not adopted sufficient risk mitigators, such as a clawback policy, CEO stock ownership guidelines, and stock holding period requirements.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/05/2025	Auto-Approved 06/05/2025		2,299	2,299
Total Shares:						2,299	2,299

RH

Meeting Date: 06/26/2025	Country: USA	Ticker: RH	Proxy Level: 3
Record Date: 05/16/2025	Meeting Type: Annual	Meeting ID: 1980239	
Primary Security ID: 74967X103	Primary CUSIP: 74967X103	Primary ISIN: US74967X1037	Primary SEDOL: BYXR425
Votable Shares: 751	Total Ballots: 1	Voting Policy: UUA	
	*Shares on Loan: 0	Shares Instructed: 751	Shares Voted: 751

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Eri Chaya	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.2	Elect Director Mark Demilio	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1.3	Elect Director Leonard Schlesinger	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<p><i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The company has not disclosed any short- and long-term E&S performance incentives; - The company allows for full board discretion in determining the treatment of outstanding equity upon a change in control; and - A lack of all the following risk-mitigating features: clawback policy, stock ownership guidelines, and stock holding requirements.</i></p>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because only 13.68 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
WCM Investment Management, 6728029085	6728029085	Confirmed	Auto-Instructed 06/12/2025	Auto-Approved 06/12/2025		751	751
Total Shares:						751	751

The Kroger Co.

Meeting Date: 06/26/2025	Country: USA	Ticker: KR	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1973888	
Primary Security ID: 501044101	Primary CUSIP: 501044101	Primary ISIN: US5010441013	Primary SEDOL: 2497406
Votable Shares: 1,226	Total Ballots: 2 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 1,226	Shares Voted: 1,226

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nora A. Aufreiter	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1b	Elect Director Kevin M. Brown	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1c	Elect Director Elaine L. Chao	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1d	Elect Director Anne Gates	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1e	Elect Director Karen M. Hoguet	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1f	Elect Director Clyde R. Moore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1g	Elect Director Ronald L. Sargent	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR the director nominees is warranted.</i>							
1h	Elect Director J. Amanda Sourry Knox (Amanda Sourry)	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1i	Elect Director Mark S. Sutton	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							

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The Kroger Co.

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Ashok Vemuri	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Long-term incentives are targeted to be half performance-conditioned with multi-year measurement periods and annual incentives were based entirely on pre-set financial and operational metrics.</i>							
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 1.56 percent of the fees paid to the auditor are for non-audit purposes.</i>							
4	Report on Educating Customers on Tobacco Waste	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this resolution is warranted because shareholders would benefit from additional information regarding the company's policies and practices related to the environmental impact regarding the disposal of tobacco products.</i>							
5	Report on Implementing Worker-Driven Social Responsibility Principles	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as shareholders would benefit from a review of the effectiveness of the company's social compliance due diligence mechanisms in its supply chain, as well as the potential impacts of implementing worker-driven social responsibility principles. The requested disclosure would allow shareholders to better assess how the company is managing associated risks and opportunities with regards to human rights issues in its agricultural supply chain.</i>							
6	Report on Risks Related to Fulfilling Information Requests for Enforcing Laws Criminalizing Reproductive or Gender-affirming Health Care	SH	Yes	Against	Against	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted, as additional disclosure on the potential risks and costs associated with the fulfillment of information requests for the enforcement of state laws related to reproductive or gender-affirming health care rights would allow shareholders to assess how the company is managing such risks.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Socially Responsible Investing, 6728029075	6728029075	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		100	100
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		1,126	1,126
Total Shares:						1,226	1,226

UiPath, Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: PATH	Proxy Level: 3
Record Date: 04/29/2025	Meeting Type: Annual	Meeting ID: 1973104	
Primary Security ID: 90364P105	Primary CUSIP: 90364P105	Primary ISIN: US90364P1057	Primary SEDOL: BMD02L5

*Shares on loan data is only provided for a select group of custodians. Please contact your ISS Client Service Team with any questions.

Total Ballots: 1

Voting Policy: UUA

Votable Shares: 219

*Shares on Loan: 0

Shares Instructed: 219

Shares Voted: 219

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel Dines	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Philippe Botteri for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are warranted for director nominee Daniel Dines as his ownership of the supervoting shares provides him with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i></p>							
1b	Elect Director Philippe Botteri	Mgmt	Yes	For	Withhold	Withhold	Withhold
<p><i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee member Philippe Botteri for maintaining a multi-class structure that is not subject to a reasonable time-based sunset provision. WITHHOLD votes are warranted for director nominee Daniel Dines as his ownership of the supervoting shares provides him with voting power control of the company. A vote FOR the remaining director nominees is warranted.</i></p>							
1c	Elect Director Michael Gordon	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1d	Elect Director Sivaramakichenane Somasegar	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1e	Elect Director Daniel D. Springer	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1f	Elect Director Karenann Terrell	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1g	Elect Director Richard P. Wong	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
1h	Elect Director June Yang	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i></p>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this proposal is warranted, with caution. While the annual incentive was based entirely on financial goals, disclosure could be improved. In addition, the planned introduction of performance-based equity for FY26 lessens the concern over equity awards to NEOs being entirely time-based for the year in review.</i></p>							
3	Ratify KPMG LLP as Auditors	Mgmt	Yes	For	For	For	For
<p><i>Voting Policy Rationale: A vote FOR this item is warranted because none of the fees paid to the auditor are for non-audit purposes.</i></p>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xpance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/13/2025	Auto-Approved 06/13/2025		219	219
Total Shares:						219	219

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United Therapeutics Corporation

Meeting Date: 06/26/2025	Country: USA	Ticker: UTHR	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1965408	
Primary Security ID: 91307C102	Primary CUSIP: 91307C102	Primary ISIN: US91307C1027	Primary SEDOL: 2430412
	Total Ballots: 1	Voting Policy: UUA	
Votable Shares: 38	*Shares on Loan: 0	Shares Instructed: 38	Shares Voted: 38

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Christopher Causey	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1b	Elect Director Raymond Dwek	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1c	Elect Director Richard Giltner	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1d	Elect Director Ray Kurzweil	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1e	Elect Director Jan Malcolm	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1f	Elect Director Linda Maxwell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1g	Elect Director Nilda Mesa	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1h	Elect Director Judy Olian	Mgmt	Yes	For	For	Against	Against
	<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>						
1i	Elect Director Christopher Patusky	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1j	Elect Director Martine Rothblatt	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1k	Elect Director Louis Sullivan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1l	Elect Director Tommy Thompson	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted as no significant concerns were identified and pay and performance are reasonably aligned at this time.</i>						
3	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						

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United Therapeutics Corporation

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For

Voting Policy Rationale: A vote FOR this item is warranted because only 2.41 percent of the fees paid to the auditor are for non-audit purposes.

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/06/2025	Auto-Approved 06/06/2025		38	38
Total Shares:						38	38

ANSYS, Inc.

Meeting Date: 06/27/2025	Country: USA	Ticker: ANSS	Proxy Level: 3
Record Date: 04/28/2025	Meeting Type: Annual	Meeting ID: 1965977	
Primary Security ID: 03662Q105	Primary CUSIP: 03662Q105	Primary ISIN: US03662Q1058	Primary SEDOL: 2045623
Votable Shares: 137	Total Ballots: 1 *Shares on Loan: 0	Voting Policy: UUA Shares Instructed: 137	Shares Voted: 137

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Claire Bramley	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1B	Elect Director Anil Chakravarthy	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1C	Elect Director Jim Frankola	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1D	Elect Director Alec Gallimore	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1E	Elect Director Ronald Hovsepian	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1F	Elect Director Barbara Scherer	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1G	Elect Director Ravi Vijayaraghavan	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 8.57 percent of the fees paid to the auditor are for non-audit purposes.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: A vote AGAINST this proposal is warranted due to the following concerns: - The majority of equity awards to the CEO are not tied to performance-contingent pay elements; - High CEO pay relative to company performance compared to the company's peers. - Excessive differentials between CEO pay and the pay of other named executive officers at the firm; and - High CEO pay in relation to company peer group CEO median pay levels.</i>							
4	Provide Right to Act by Written Consent	SH	Yes	Against	For	For	For
<i>Voting Policy Rationale: A vote FOR this proposal is warranted given that the ability to act by written consent would enhance shareholder rights.</i>							

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		137	137
Total Shares:						137	137

Aon Plc

Meeting Date: 06/27/2025	Country: Ireland	Ticker: AON	Proxy Level: N/A
Record Date: 04/11/2025	Meeting Type: Annual	Meeting ID: 1964551	
Primary Security ID: G0403H108	Primary CUSIP: G0403H108	Primary ISIN: IE00BLP1HW54	Primary SEDOL: BLP1HW5
Votable Shares: 263	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 263
	*Shares on Loan: 0	Shares Instructed: 263	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Lester B. Knight	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Gregory C. Case	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.3	Elect Director Jose Antonio Alvarez	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.4	Elect Director Jin-Yong Cai	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.5	Elect Director Jeffrey C. Campbell	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.6	Elect Director Cheryl A. Francis	Mgmt	Yes	For	For	Against	Against
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							

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Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Adriana Karaboutis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.8	Elect Director Richard C. Notebaert	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.9	Elect Director Gloria Santana	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.10	Elect Director Sarah E. Smith	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.11	Elect Director Byron O. Spruell	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
1.12	Elect Director James G. Stavridis	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>						
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal is warranted. Following last year's low say-on-pay vote, the committee demonstrated sufficient responsiveness by taking certain actions to address shareholders' concerns. Although some concern is noted regarding the lack of goal disclosure, pay programs were predominantly performance-based and pay and performance were reasonably aligned for the year in review.</i>						
3	Ratify Ernst & Young LLP as Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.51 percent of the fees paid to the auditor are for non-audit purposes.</i>						
4	Ratify Ernst & Young Chartered Accountants as Statutory Auditor	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this item is warranted because only 6.51 percent of the fees paid to the auditor are for non-audit purposes.</i>						
5	Authorize the Audit Committee to Fix Remuneration of Auditors	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR this proposal to ratify the auditor is warranted.</i>						
6	Authorise Issue of Equity	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these proposals is warranted because the proposed amounts and durations are within recommended limits.</i>						
7	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: A vote FOR these proposals is warranted because the proposed amounts and durations are within recommended limits.</i>						
8	Amend Omnibus Stock Plan	Mgmt	Yes	For	For	For	For
	<i>Voting Policy Rationale: Based on the Equity Plan Scorecard evaluation (EPSC), a vote FOR this proposal is warranted.</i>						

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Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/09/2025	Auto-Approved 06/09/2025		263	263
Total Shares:						263	263

MongoDB, Inc.

Meeting Date: 06/30/2025	Country: USA	Ticker: MDB	Proxy Level: 3
Record Date: 05/01/2025	Meeting Type: Annual	Meeting ID: 1975660	
Primary Security ID: 60937P106	Primary CUSIP: 60937P106	Primary ISIN: US60937P1066	Primary SEDOL: BF2FJ99
Votable Shares: 81	Total Ballots: 1	Voting Policy: UUA	Shares Voted: 81
	*Shares on Loan: 0	Shares Instructed: 81	

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Francisco D'Souza	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: There is gender and racial diversity on the board. There is at least 30 percent diversity.</i>							
1.2	Elect Director Charles M. Hazard, Jr.	Mgmt	Yes	For	Withhold	Withhold	Withhold
<i>Voting Policy Rationale: WITHHOLD votes are warranted for Governance Committee chair Charles (Chip) Hazard Jr. given the board's failure to remove, or subject to a sunset requirement, the classified board which adversely impacts shareholder rights.</i>							
1.3	Elect Director Tom Killalea	Mgmt	Yes	For	For	Withhold	Withhold
<i>Voting Policy Rationale: The nominee is employed full-time and sits on boards at more than 2 public companies.</i>							
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: Although some concerns are noted, a vote FOR this proposal is warranted as pay and performance are reasonably aligned at this time.</i>							
3	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year	One Year
<i>Voting Policy Rationale: A vote for the adoption of an ANNUAL say-on-pay frequency is warranted. Annual say-on-pay votes are considered a best practice as they give shareholders a regular opportunity to opine on executive pay.</i>							
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	Yes	For	For	For	For
<i>Voting Policy Rationale: A vote FOR this item is warranted because only 4.68 percent of the fees paid to the auditor are for non-audit purposes.</i>							
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	Yes	For	For	For	For

Ballot Details

Institutional Account Detail (IA Name, IA Number)	Custodian Account Number	Ballot Status	Instructed	Approved	Ballot Voting Status	Votable Shares	Shares Voted
Xponance Russell 1000 Screened Index, 4000133-001	4000133-001	Confirmed	Auto-Instructed 06/10/2025	Auto-Approved 06/10/2025		81	81

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PARAMETERS

Location(s): Unitarian Universalist Association
 Account Group(s): All Account Groups
 Institution Account(s): All Institution Accounts
 Custodian Account(s): All Custodian Accounts
 Additional Policy: None
 ADR Meetings: All Meetings
 Ballot Statuses: All Statuses
 Contrary Votes: All Votes
 Date Format: MM/DD/YYYY
 ESG Pillar: All Pillars
 ESG Statistics Preference: Include Blended ESG Pillars
 Header Display: Repeat Headers for Any Meeting Split by Multiple Pages
 Markets: All Markets
 Meeting ID's: All Meeting ID's
 Meeting Types: All Meeting Types
 PoA Markets: All Markets
 Proposal Category: All Categories
 Proposal Proponents: All Proponents
 Proposal Subcategory: All Subcategories
 Rationale: All Rationale
 Recommendations: All Recommendations
 Record Date Markets: All Markets
 Reregistration Meetings: Include Reregistration Meetings
 Shareblocking Markets: All Markets
 Significant Vote: None
 Sort Order: Meeting Date, Company Name
 Vote Instructions: All Instructions
 Voting Policies: All Policies
 Zero (0) Share Ballots: Exclude 0 Share Ballots
 Account Watchlist: None
 Country Watchlist: None
 Issuer Watchlist: None
 Proposal Code Watchlist: None
 Proposal Code Watchlist - Agenda Output: Include Exact Matches Only

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