Chicory Wealth

# Shareholder Activism

Your investments **speak volumes**. Chicory can help you leverage your ownership stake to create meaningful change for people, the planet, and our communities.



## Shareholder Engagement Levers

Chicory's dedicated Social Responsibility team connects you with activist-led campaigns that align with your values. Here are some of the ways we engage with investor coalitions, both firm-wide and on your behalf.

### Join Investor Campaigns

Chicory works alongside investor coalitions to bring public awareness to corporate behaviors that create systemic risks to investors, our communities, and the planet.

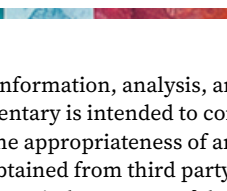
### File Shareholder Proposals

We notify you of opportunities to file shareholder proposals, which directly ask corporate leadership to take action on urgent environmental, social, and governance issues. We'll guide you through the entire process.

### Vote Your Shares

We cast your shareholder votes in line with your values, and by the recommendations of our movement partners.

## The Boycott, Divest, Sanctions (BDS) Movement



**BDS (Boycott, Divestment, Sanctions)** is a Palestinian-led, inclusive, anti-racist human rights movement that is opposed on principle to all forms of discrimination, including anti-semitism and Islamophobia. **Many of the shareholder engagement efforts Chicory participates in are aligned with this work.**

**Chicory Wealth's core investment portfolio is BDS-compliant,** meaning we do not invest in companies that provide military, intelligence, or financial support to international war crimes and human rights violations committed by the Israeli government, or companies that profit from the occupation of Palestinian territories.

## Read our Impact Report

Learn about the shareholder engagement work happening at Chicory.




## Areas of Impact

**Climate Action**
Building a regenerative and sustainable ecosystem that promotes the health and longevity of our planet.

**Human Rights**
The global fight for our innate human right to exist safely, without threat of weapons of war, forced labor, unjust detainment, or inhumane working conditions.

**Social Justice**
Promoting just treatment and equitable systems for people of color, indigenous communities, and those who identify as LGBTQ+, women, and gender-expansive.

**Public Health**
Building and enhancing community infrastructure to promote clean drinking water, equitable access to healthcare, clean energy, and healthy living conditions for all people.

## How to Engage Your Advisor

Are you interested in participating in shareholder engagement campaigns? Let us know!

- If you're notified of a **campaign or investor letter** through an advocacy group you're involved with, send it to your advisor. If it aligns with our investment values and client priorities, we're happy to join as a public supporter or movement partner.
- If you'd like to **attend a company's Annual General Meeting (AGM)**, which happen in the spring and fall, let your advisor know. Chicory works with Racial Justice Investing, Investor Advocates for Social Justice, and the Interfaith Center on Corporate Responsibility to monitor these meetings and can send you information on how to join.
- Interested in co-filing a shareholder proposal? Let your advisor know, and we'll notify you when opportunities arise if you meet the SEC eligibility requirements.

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