









SHAREHOLDER ACTIVISM Use Your Voice to Enact Corporate Change



with your beliefs is through shareholder activism - a strategy that leverages your ownership in a company to influence corporate practices and behavior. Shareholder activism is a key tenant of

Chicory Wealth's Socially Conscious

One powerful way to align your investments

Investing approach. We help clients align their values with their investments using the following tools: **Public Campaigns**



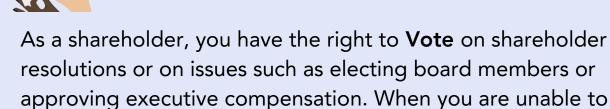
Activist groups seeking to raise public awareness about issues

related to a company's activities or governance practices may publish a Shareholder Letter to garner investor support and gain the attention of the media to put public pressure on corporations. **Shareholder Resolutions**



A Shareholder Resolution is a formal proposal put forth by a group of shareholders to be voted on during a company's annual

general meeting (AGM). Resolutions are a powerful tool to escalate important calls-to-action directly with the company's board. To file a shareholder resolution, the filers must meet certain SEC ownership thresholds. **Proxy Voting**



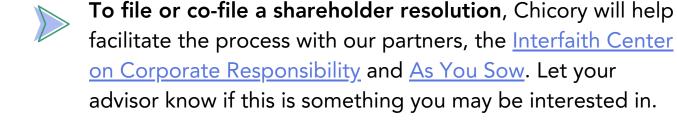
resolutions or on issues such as electing board members or

attend the meeting yourself, your advisor can vote proxy on your behalf. How to Engage Your Advisor

signatory" in movements that are in line with our investment values and are important to our clients.

are always willing to participate as an "institutional

Forward shareholder letters of interest to your advisor. We



values. If you find a resolution you care about, we encourage you to check with your advisor to confirm that your shares have already been voted. Chicory conducts our own independent research, along with data from <u>Sustainalytics</u>, to monitor active resolutions.

The Greater BDS Movement

Divestment

Chicory will automatically cast proxy votes on your behalf

for resolutions that we know align with your core investment

Boycott

as a tool for systemic change.

including anti-semitism and Islamophobia. Chicory Wealth's core investment portfolio is BDS-compliant, meaning we do not invest in companies that provide military, intelligence, or financial support

activism is one part of a multi-faceted

approach to leveraging financial resources

BDS (Boycott, Divestment, Sanctions) is

a Palestinian-led, inclusive, anti-racist

human rights movement that is opposed

on principle to all forms of discrimination,

Sanctions

Resources for Investors Chicory's Shareholder Activism Partners:





to international war crimes and human rights violations committed by the Israeli government, or companies that profit from the occupation of Palestinian territories.

More Information:

• Curent Shareholder Engagement Initiatives - ICCR

ESG Proxy Voting Guideline - Sustainalytics

• BDS Corporate Complicity Criteria - BDS National Committee

RJI

Racial Justice Investing

- UN Sustainable Development Goals United Nations
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