Wespath
BENEFITS | INVESTMENTS

Wespath's Sustainable Investment Work

Central Conference Pensions Forum | Nairobi, November 2023

Jake Barnett

Managing Director—
Sustainable Investment Strategies

Sustainable—
What Is Sustainability?

> …Meet the needs of the present without compromising the ability of future generations to meet their own needs…

1987 United Nations World Commission on Environment and Development "Bruntland Commission"

Sustainable—
What About ESG?

Environment

Social

Governance

> “The intentional integration of **environmental**, **social** and **governance** (**ESG**) factors in the selection and management of investments positively affects long-term performance.”

Guided by Fiduciary Duty

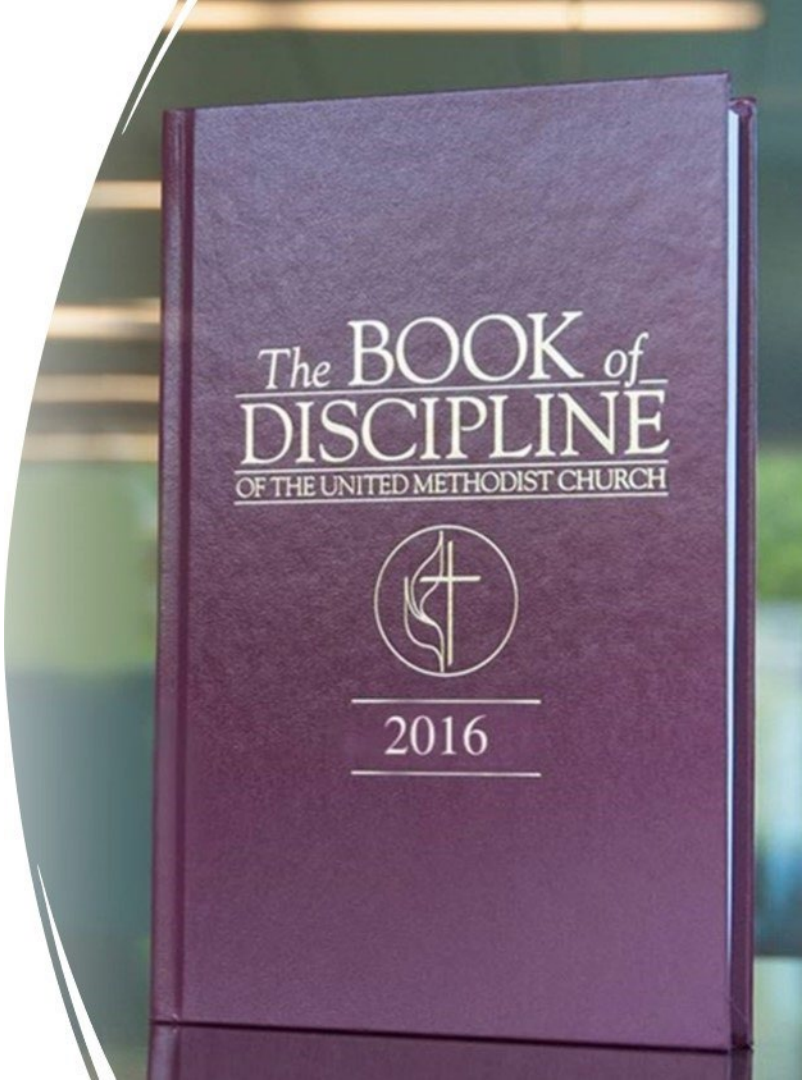
The United Methodist Church asks that Wespath:

¶1504.14

"… discharge its fiduciary duties … solely in the interest of the participants and beneficiaries … with care, skill, prudence and diligence …"

¶717

"… make a conscious effort to invest … with the goals outlined in the Social Principles"



Wespath's Vision of a Sustainable Economy

We organize our efforts through our Sustainable Economy Framework (SEF), in which we define a **sustainable global economy** as one that promotes:

Social cohesion

Long-term prosperity for all

Environmental health

Sustainable Investment Framework

Invest

- External asset manager ESG benchmarking
- Positive Social Purpose Lending Program
- Low-carbon energy solutions

Engage

- Proxy voting
- Corporations
- Policymakers
- Shareholder resolutions

Avoid

- Ethical exclusions
- Financial risk exclusions

Stewardship—How Your Investments Make an Impact

Engagement and Proxy Voting

- Voting on ESG-related shareholder resolutions
- Frequent conversations with corporations and peers
- Dialoguing with policymakers
- Active participation in sustainable investment coalitions
- Working on ESG issues with our external asset managers

IOPA
INVESTORS FOR OPIOID AND PHARMACEUTICAL ACCOUNTABILITY

Climate Action 100+
Global Investors Driving Business Transition

MIDWEST INVESTORS DIVERSITY INITIATIVE

Engagement Highlights

Environmental

THE NET-ZERO ASSET OWNER ALLIANCE

Climate Action 100+
Global Investors Driving Business Transition

OXY

Chevron

bp

Social

AMGEN

RITE AID

HERSHEY'S
The Hershey Company

Allergan

AmerisourceBergen

CardinalHealth

Opioid Accountability

IOA INVESTORS FOR OPIOID ACCOUNTABILITY

Committed to Source 100% Fair Trade Cocoa by 2020

Governance

AMERCO

HURON

balchem
Solve Today. Shape Tomorrow.

FIRST FINANCIAL NETWORK

Century ALUMINUM

Board Diversity

MIDWEST INVESTORS DIVERSITY INITIATIVE

THIRTY PERCENT COALITION

Impact Investing Themes

Impact Investments

- **Affordable Housing**

- **Sustainable Agribusiness**

- **Affordable and Clean Energy Access**

- **Renewable Infrastructure**

- **Education**

- **Healthcare**

Available Now:

- Biennial report covers sustainable investment activities from 2021 and 2022

Scan QR Code to download in English

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