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# Steadyhand

## Sustainability Framework

*A Sustainable Steadyhand means building a company that can address clients' needs for generations to come. Our definition goes beyond just our investment vehicles. It includes our conduct with clients and peers.*

Putting clients' interests at the forefront of our decisions leads to sustainable business practices. How we implement this investor-first approach is guided by a set of beliefs:

### **Top-tier investment management and advice are our top priorities**

Our clients join Steadyhand to grow their wealth. This is our main job. We prioritize those sustainability practices that will help achieve this goal.

### **Considering ESG issues improves returns**

Taking a long-term perspective when making investment decisions increases the odds of success. To be confident holding a company for years, our managers must review all risks – including environmental, social and governance (ESG) – with a focus on the specific issues that impact each company's financial performance. For example, data security is a more significant ESG risk to a bank while working conditions are more relevant to a clothing manufacturer.

*How we implement this: all our funds incorporate an ESG-integration approach and we highlight related issues in our reporting.*

### **Alignment builds trust**

We tie our success with that of our clients by aligning our business practices with their interests. It pushes us to act on our best ideas and not offer products and services that we wouldn't use ourselves. It is our hope that this alignment also allows for a more trusting relationship over time.

*How we implement this: we invest alongside our clients (eat our own cooking), charge low fees that keep getting lower, and provide transparent reporting and communications.*

### **Corporate culture = sustainability**

We want to create an atmosphere that feeds our passion for client experience, investment excellence, diversity of thought and teamwork. These attributes promote better decision making and allow us to attract and retain talented professionals that drive toward a common goal – grow our clients' wealth.

*How we implement this: we're 100% employee-owned and strive to hire from diverse backgrounds.*

