

## VOTE SUMMARY REPORT

Date range covered : 01/01/2024 to 12/31/2024

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): MAWER USEF

### Intuit Inc.

**Meeting Date:** 01/18/2024

**Country:** USA

**Ticker:** INTU

**Record Date:** 11/20/2023

**Meeting Type:** Annual

**Primary Security ID:** 461202103

**Shares Voted:** 36,149

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Eve Burton	Mgmt	For	For
1b	Elect Director Scott D. Cook	Mgmt	For	For
1c	Elect Director Richard L. Dalzell	Mgmt	For	For
1d	Elect Director Sasan K. Goodarzi	Mgmt	For	For
1e	Elect Director Deborah Liu	Mgmt	For	For
1f	Elect Director Tekedra Mawakana	Mgmt	For	For
1g	Elect Director Suzanne Nora Johnson	Mgmt	For	For
1h	Elect Director Ryan Roslansky	Mgmt	For	For
1i	Elect Director Thomas Szkutak	Mgmt	For	For
1j	Elect Director Raul Vazquez	Mgmt	For	For
1k	Elect Director Eric S. Yuan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
5	Amend Omnibus Stock Plan	Mgmt	For	For
6	Report on Climate Risk in Retirement Plan Options	SH	Against	Against

### Becton, Dickinson and Company

**Meeting Date:** 01/23/2024

**Country:** USA

**Ticker:** BDX

**Record Date:** 12/04/2023

**Meeting Type:** Annual

**Primary Security ID:** 075887109

# Becton, Dickinson and Company

Shares Voted: 367,988

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director William M. Brown	Mgmt	For	For
1.2	Elect Director Catherine M. Burzik	Mgmt	For	For
1.3	Elect Director Carrie L. Byington	Mgmt	For	For
1.4	Elect Director R. Andrew Eckert	Mgmt	For	For
1.5	Elect Director Claire M. Fraser	Mgmt	For	For
1.6	Elect Director Jeffrey W. Henderson	Mgmt	For	For
1.7	Elect Director Christopher Jones	Mgmt	For	For
1.8	Elect Director Thomas E. Polen	Mgmt	For	For
1.9	Elect Director Timothy M. Ring	Mgmt	For	For
1.10	Elect Director Bertram L. Scott	Mgmt	For	For
1.11	Elect Director Joanne Waldstreicher	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

# Visa Inc.

Meeting Date: 01/23/2024

Country: USA

Ticker: V

Record Date: 11/24/2023

Meeting Type: Annual

Primary Security ID: 92826C839

Shares Voted: 563,927

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For
1d	Elect Director Ramon Laguarta	Mgmt	For	For
1e	Elect Director Teri L. List	Mgmt	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For
1g	Elect Director Ryan McInerney	Mgmt	For	For

## Visa Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1h	Elect Director Denise M. Morrison	Mgmt	For	For
1i	Elect Director Pamela Murphy	Mgmt	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify KPMG LLP as Auditors	Mgmt	For	For
4	Approve Class B Exchange Offer Program Certificate Amendments	Mgmt	For	For
5	Adjourn Meeting	Mgmt	For	For
6	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	Against

## Accenture plc

**Meeting Date:** 01/31/2024

**Country:** Ireland

**Ticker:** ACN

**Record Date:** 12/04/2023

**Meeting Type:** Annual

**Primary Security ID:** G1151C101

**Shares Voted:** 164,700

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jaime Ardila	Mgmt	For	For
1b	Elect Director Martin Bruder Muller	Mgmt	For	For
1c	Elect Director Alan Jope	Mgmt	For	For
1d	Elect Director Nancy McKinstry	Mgmt	For	For
1e	Elect Director Beth E. Mooney	Mgmt	For	For
1f	Elect Director Gilles C. Pelisson	Mgmt	For	For
1g	Elect Director Paula A. Price	Mgmt	For	For
1h	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For
1i	Elect Director Arun Sarin	Mgmt	For	For
1j	Elect Director Julie Sweet	Mgmt	For	For
1k	Elect Director Tracey T. Travis	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Accenture plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
3	Amend Omnibus Stock Plan	Mgmt	For	For
4	Amend Nonqualified Employee Stock Purchase Plan	Mgmt	For	For
5	Approve KPMG LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For
6	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For
7	Authorize Board to Opt-Out of Statutory Pre-Emption Rights	Mgmt	For	For
8	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For

## Warner Music Group Corp.

Meeting Date: 03/05/2024

Country: USA

Ticker: WMG

Record Date: 01/08/2024

Meeting Type: Annual

Primary Security ID: 934550203

Shares Voted: 368,488

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Robert Kyncl	Mgmt	For	For
1b	Elect Director Lincoln Benet	Mgmt	For	Against
1c	Elect Director Len Blavatnik	Mgmt	For	Against
1d	Elect Director Valentin ("Val") Blavatnik	Mgmt	For	Against
1e	Elect Director Mathias Dopfner	Mgmt	For	For
1f	Elect Director Nancy Dubuc	Mgmt	For	For
1g	Elect Director Noreena Hertz	Mgmt	For	Against
1h	Elect Director Ynon Kreiz	Mgmt	For	Against
1i	Elect Director Ceci Kurzman	Mgmt	For	Against
1j	Elect Director Michael Lynton	Mgmt	For	For
1k	Elect Director Donald A. Wagner	Mgmt	For	Against
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against

## Cencora, Inc.

Meeting Date: 03/12/2024

Country: USA

Ticker: COR

Record Date: 01/16/2024

Meeting Type: Annual

Primary Security ID: 03073E105

Shares Voted: 410,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Ornella Barra	Mgmt	For	For
1b	Elect Director Werner Baumann	Mgmt	For	For
1c	Elect Director Steven H. Collis	Mgmt	For	For
1d	Elect Director D. Mark Durcan	Mgmt	For	For
1e	Elect Director Richard W. Gochnauer	Mgmt	For	For
1f	Elect Director Lon R. Greenberg	Mgmt	For	For
1g	Elect Director Kathleen W. Hyle	Mgmt	For	For
1h	Elect Director Lorence H. Kim	Mgmt	For	For
1i	Elect Director Redonda G. Miller	Mgmt	For	For
1j	Elect Director Dennis M. Nally	Mgmt	For	For
1k	Elect Director Lauren M. Tyler	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For
5	Amend Certificate of Incorporation	Mgmt	For	For
6	Enhance Majority Vote for the Election of Directors	SH	Against	Against

## Adobe Inc.

Meeting Date: 04/17/2024

Country: USA

Ticker: ADBE

Record Date: 02/20/2024

Meeting Type: Annual

Primary Security ID: 00724F101

Shares Voted: 38,765

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Cristiano Amon	Mgmt	For	Abstain
1b	Elect Director Amy Banse	Mgmt	For	Abstain

## Adobe Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1c	Elect Director Brett Biggs	Mgmt	For	Abstain
1d	Elect Director Melanie Boulden	Mgmt	For	Abstain
1e	Elect Director Frank Calderoni	Mgmt	For	Abstain
1f	Elect Director Laura Desmond	Mgmt	For	Abstain
1g	Elect Director Shantanu Narayen	Mgmt	For	Abstain
1h	Elect Director Spencer Neumann	Mgmt	For	Abstain
1i	Elect Director Kathleen Oberg	Mgmt	For	Abstain
1j	Elect Director Dheeraj Pandey	Mgmt	For	Abstain
1k	Elect Director David Ricks	Mgmt	For	Abstain
1l	Elect Director Daniel Rosensweig	Mgmt	For	Abstain
2	Amend Omnibus Stock Plan	Mgmt	For	Abstain
3	Ratify KPMG LLP as Auditors	Mgmt	For	Abstain
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Abstain
5	Require a Majority Vote Standard for the Election of Directors with Mandatory Resignation Policy	SH	Against	Abstain
6	Report on Hiring of Persons with Arrest or Incarceration Records	SH	Against	Abstain

## The Sherwin-Williams Company

Meeting Date: 04/17/2024

Country: USA

Ticker: SHW

Record Date: 02/20/2024

Meeting Type: Annual

Primary Security ID: 824348106

Shares Voted: 218,607

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Kerrii B. Anderson	Mgmt	For	For
1b	Elect Director Arthur F. Anton	Mgmt	For	For
1c	Elect Director Jeff M. Fettig	Mgmt	For	For
1d	Elect Director John G. Morikis	Mgmt	For	For
1e	Elect Director Heidi G. Petz	Mgmt	For	For
1f	Elect Director Christine A. Poon	Mgmt	For	For

## The Sherwin-Williams Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1g	Elect Director Aaron M. Powell	Mgmt	For	For
1h	Elect Director Marta R. Stewart	Mgmt	For	For
1i	Elect Director Michael H. Thaman	Mgmt	For	For
1j	Elect Director Matthew Thornton, III	Mgmt	For	For
1k	Elect Director Thomas L. Williams	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Adopt Simple Majority Vote	SH	Against	For

## Carrier Global Corporation

**Meeting Date:** 04/18/2024      **Country:** USA      **Ticker:** CARR  
**Record Date:** 02/27/2024      **Meeting Type:** Annual  
**Primary Security ID:** 14448C104

**Shares Voted:** 422,116

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jean-Pierre Garnier	Mgmt	For	For
1b	Elect Director David L. Gitlin	Mgmt	For	For
1c	Elect Director John J. Greisch	Mgmt	For	For
1d	Elect Director Charles M. Holley, Jr.	Mgmt	For	For
1e	Elect Director Michael M. McNamara	Mgmt	For	For
1f	Elect Director Susan N. Story	Mgmt	For	For
1g	Elect Director Michael A. Todman	Mgmt	For	For
1h	Elect Director Maximilian (Max) Viessmann	Mgmt	For	For
1i	Elect Director Virginia M. Wilson	Mgmt	For	For
1j	Elect Director Beth A. Wozniak	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## Carrier Global Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
4	Report on Lobbying Payments and Policy	SH	Against	Against

## American Electric Power Company, Inc.

**Meeting Date:** 04/23/2024      **Country:** USA      **Ticker:** AEP  
**Record Date:** 02/26/2024      **Meeting Type:** Annual  
**Primary Security ID:** 025537101

**Shares Voted:** 446,438

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Ben Fowke	Mgmt	For	For
1.2	Elect Director Art A. Garcia	Mgmt	For	For
1.3	Elect Director Hunter C. Gary	Mgmt	For	For
1.4	Elect Director Linda A. Goodspeed	Mgmt	For	For
1.5	Elect Director Donna A. James	Mgmt	For	For
1.6	Elect Director Sandra Beach Lin	Mgmt	For	For
1.7	Elect Director Henry P. Linginfelter	Mgmt	For	For
1.8	Elect Director Margaret M. McCarthy	Mgmt	For	For
1.9	Elect Director Daryl Roberts	Mgmt	For	For
1.10	Elect Director Daniel G. Stoddard	Mgmt	For	For
1.11	Elect Director Sara Martinez Tucker	Mgmt	For	For
1.12	Elect Director Lewis Von Thaer	Mgmt	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For

## Bio-Rad Laboratories, Inc.

**Meeting Date:** 04/23/2024      **Country:** USA      **Ticker:** BIO  
**Record Date:** 02/26/2024      **Meeting Type:** Annual  
**Primary Security ID:** 090572207

## Bio-Rad Laboratories, Inc.

Shares Voted: 59,577

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Melinda Litherland	Mgmt	For	For
1.2	Elect Director Arnold A. Pinkston	Mgmt	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For

## BorgWarner Inc.

Meeting Date: 04/24/2024

Country: USA

Ticker: BWA

Record Date: 03/01/2024

Meeting Type: Annual

Primary Security ID: 099724106

Shares Voted: 610,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1A	Elect Director Sara A. Greenstein	Mgmt	For	For
1B	Elect Director Michael S. Hanley	Mgmt	For	For
1C	Elect Director Frederic B. Lissalde	Mgmt	For	For
1D	Elect Director Shaun E. McAlmont	Mgmt	For	For
1E	Elect Director Deborah D. McWhinney	Mgmt	For	For
1F	Elect Director Alexis P. Michas	Mgmt	For	For
1G	Elect Director Sailaja K. Shankar	Mgmt	For	For
1H	Elect Director Hau N. Thai-Tang	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## Johnson & Johnson

Meeting Date: 04/25/2024

Country: USA

Ticker: JNJ

Record Date: 02/27/2024

Meeting Type: Annual

Primary Security ID: 478160104

## Johnson & Johnson

Shares Voted: 273,216

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For
1b	Elect Director Mary C. Beckerle	Mgmt	For	For
1c	Elect Director D. Scott Davis	Mgmt	For	For
1d	Elect Director Jennifer A. Doudna	Mgmt	For	For
1e	Elect Director Joaquin Duato	Mgmt	For	For
1f	Elect Director Marillyn A. Hewson	Mgmt	For	For
1g	Elect Director Paula A. Johnson	Mgmt	For	For
1h	Elect Director Hubert Joly	Mgmt	For	For
1i	Elect Director Mark B. McClellan	Mgmt	For	For
1j	Elect Director Anne M. Mulcahy	Mgmt	For	For
1k	Elect Director Mark A. Weinberger	Mgmt	For	For
1l	Elect Director Nadja Y. West	Mgmt	For	For
1m	Elect Director Eugene A. Woods	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against
5	Report on Impact of Extended Patent Exclusivities on Product Access	SH		

## Texas Instruments Incorporated

Meeting Date: 04/25/2024

Country: USA

Ticker: TXN

Record Date: 02/28/2024

Meeting Type: Annual

Primary Security ID: 882508104

Shares Voted: 184,779

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Mark A. Blinn	Mgmt	For	For
1b	Elect Director Todd M. Bluedorn	Mgmt	For	For

## Texas Instruments Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1c	Elect Director Janet F. Clark	Mgmt	For	For
1d	Elect Director Carrie S. Cox	Mgmt	For	For
1e	Elect Director Martin S. Craighead	Mgmt	For	For
1f	Elect Director Reginald DesRoches	Mgmt	For	For
1g	Elect Director Curtis C. Farmer	Mgmt	For	For
1h	Elect Director Jean M. Hobby	Mgmt	For	For
1i	Elect Director Haviv Ilan	Mgmt	For	For
1j	Elect Director Ronald Kirk	Mgmt	For	For
1k	Elect Director Pamela H. Patsley	Mgmt	For	For
1l	Elect Director Robert E. Sanchez	Mgmt	For	For
1m	Elect Director Richard K. Templeton	Mgmt	For	For
2	Approve Omnibus Stock Plan	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For
6	Report on Due Diligence Efforts to Trace End-User Misuse of Company Products	SH	Against	Against

## Abbott Laboratories

**Meeting Date:** 04/26/2024

**Country:** USA

**Ticker:** ABT

**Record Date:** 02/28/2024

**Meeting Type:** Annual

**Primary Security ID:** 002824100

**Shares Voted:** 714,512

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Robert J. Alpern	Mgmt	For	For
1.2	Elect Director Claire Babineaux-Fontenot	Mgmt	For	For
1.3	Elect Director Sally E. Blount	Mgmt	For	For
1.4	Elect Director Robert B. Ford	Mgmt	For	For
1.5	Elect Director Paola Gonzalez	Mgmt	For	For

## Abbott Laboratories

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.6	Elect Director Michelle A. Kumbier	Mgmt	For	For
1.7	Elect Director Darren W. McDew	Mgmt	For	For
1.8	Elect Director Nancy McKinstry	Mgmt	For	For
1.9	Elect Director Michael G. O'Grady	Mgmt	For	For
1.10	Elect Director Michael F. Roman	Mgmt	For	For
1.11	Elect Director Daniel J. Starks	Mgmt	For	For
1.12	Elect Director John G. Stratton	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Ryan Specialty Holdings, Inc.

Meeting Date: 04/30/2024

Country: USA

Ticker: RYAN

Record Date: 03/11/2024

Meeting Type: Annual

Primary Security ID: 78351F107

Shares Voted: 363,674

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Patrick G. Ryan	Mgmt	For	For
1.2	Elect Director Michelle L. Collins	Mgmt	For	For
1.3	Elect Director D. Cameron Findlay	Mgmt	For	For
1.4	Elect Director John W. Rogers, Jr.	Mgmt	For	For
1.5	Elect Director Francesca Cornelli	Mgmt	For	For
1.6	Elect Director Anthony J. Kuczinski	Mgmt	For	For
1.7	Elect Director Patrick G. Ryan, Jr.	Mgmt	For	Withhold
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## AptarGroup, Inc.

Meeting Date: 05/01/2024

Country: USA

Ticker: ATR

Record Date: 03/08/2024

Meeting Type: Annual

Primary Security ID: 038336103

Shares Voted: 247,243

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Sarah Glickman	Mgmt	For	For
1b	Elect Director Matt Trerotola	Mgmt	For	For
1c	Elect Director Ralf K. Wunderlich	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Certificate of Incorporation to Reflect New Delaware Law Provisions Regarding Officer Exculpation	Mgmt	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## PepsiCo, Inc.

Meeting Date: 05/01/2024

Country: USA

Ticker: PEP

Record Date: 03/01/2024

Meeting Type: Annual

Primary Security ID: 713448108

Shares Voted: 203,810

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Segun Agbaje	Mgmt	For	For
1b	Elect Director Jennifer Bailey	Mgmt	For	For
1c	Elect Director Cesar Conde	Mgmt	For	For
1d	Elect Director Ian Cook	Mgmt	For	For
1e	Elect Director Edith W. Cooper	Mgmt	For	For
1f	Elect Director Susan M. Diamond	Mgmt	For	For
1g	Elect Director Dina Dublon	Mgmt	For	For
1h	Elect Director Michelle Gass	Mgmt	For	For
1i	Elect Director Ramon L. Laguarta	Mgmt	For	For
1j	Elect Director Dave J. Lewis	Mgmt	For	For
1k	Elect Director David C. Page	Mgmt	For	For
1l	Elect Director Robert C. Pohlrad	Mgmt	For	For

## PepsiCo, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1m	Elect Director Daniel Vasella	Mgmt	For	For
1n	Elect Director Darren Walker	Mgmt	For	For
1o	Elect Director Alberto Weisser	Mgmt	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
4	Amend Omnibus Stock Plan	Mgmt	For	For
5	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	Against
6	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against
7	Amend Bylaws to Adopt a Director Election Resignation	SH	Against	For
8	Issue Third Party Assessment of Safety of Non-Sugar Sweeteners	SH	Against	Against
9	Report on Risks Related to Biodiversity and Nature Loss	SH	Against	Against
10	Report on Third-Party Racial Equity Audit	SH	Against	Against
11	Report on Risks Created by the Company's Diversity, Equity, and Inclusion Efforts	SH	Against	Against
12	Issue Transparency Report on Global Public Policy and Political Influence	SH	Against	Against

## S&P Global Inc.

**Meeting Date:** 05/01/2024      **Country:** USA      **Ticker:** SPGI  
**Record Date:** 03/11/2024      **Meeting Type:** Annual  
**Primary Security ID:** 78409V104

**Shares Voted:** 92,000

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Marco Alvera	Mgmt	For	For
1.2	Elect Director Jacques Esculier	Mgmt	For	For
1.3	Elect Director Gay Huey Evans	Mgmt	For	For
1.4	Elect Director William D. Green	Mgmt	For	For
1.5	Elect Director Stephanie C. Hill	Mgmt	For	For

## S&P Global Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.6	Elect Director Rebecca Jacoby	Mgmt	For	For
1.7	Elect Director Robert P. Kelly	Mgmt	For	For
1.8	Elect Director Ian P. Livingston	Mgmt	For	For
1.9	Elect Director Maria R. Morris	Mgmt	For	For
1.10	Elect Director Douglas L. Peterson	Mgmt	For	For
1.11	Elect Director Richard E. Thornburgh	Mgmt	For	For
1.12	Elect Director Gregory Washington	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Deferred Compensation Plan	Mgmt	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For

## AbbVie Inc.

**Meeting Date:** 05/03/2024

**Country:** USA

**Ticker:** ABBV

**Record Date:** 03/04/2024

**Meeting Type:** Annual

**Primary Security ID:** 00287Y109

**Shares Voted:** 157,200

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Roxanne S. Austin	Mgmt	For	For
1b	Elect Director Richard A. Gonzalez	Mgmt	For	For
1c	Elect Director Susan E. Quaggin	Mgmt	For	For
1d	Elect Director Rebecca B. Roberts	Mgmt	For	For
1e	Elect Director Glenn F. Tilton	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year
5	Eliminate Supermajority Vote Requirement	Mgmt	For	For

## AbbVie Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
6	Adopt Simple Majority Vote	SH	Against	Against
7	Report on Lobbying Payments and Policy	SH	Against	Against
8	Report on Impact of Extended Patent Exclusivities on Product Access	SH	Against	Against

## BWX Technologies, Inc.

**Meeting Date:** 05/03/2024      **Country:** USA      **Ticker:** BWXT  
**Record Date:** 03/06/2024      **Meeting Type:** Annual  
**Primary Security ID:** 05605H100

**Shares Voted:** 498,800

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jan A. Bertsch	Mgmt	For	For
1b	Elect Director Gerhard F. Burbach	Mgmt	For	For
1c	Elect Director Rex D. Geveden	Mgmt	For	For
1d	Elect Director James M. Jaska	Mgmt	For	For
1e	Elect Director Kenneth J. Krieg	Mgmt	For	For
1f	Elect Director Leland D. Melvin	Mgmt	For	For
1g	Elect Director Robert L. Nardelli	Mgmt	For	For
1h	Elect Director Barbara A. Niland	Mgmt	For	For
1i	Elect Director Nicole W. Piasecki	Mgmt	For	For
1j	Elect Director John M. Richardson	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For

## The Hershey Company

**Meeting Date:** 05/06/2024      **Country:** USA      **Ticker:** HSY  
**Record Date:** 03/08/2024      **Meeting Type:** Annual  
**Primary Security ID:** 427866108

# The Hershey Company

Shares Voted: 201,866

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Michele G. Buck	Mgmt	For	For
1.2	Elect Director Victor L. Crawford	Mgmt	For	For
1.3	Elect Director Robert M. Dutkowsky	Mgmt	For	For
1.4	Elect Director Mary Kay Haben	Mgmt	For	For
1.5	Elect Director M. Diane Koken	Mgmt	For	For
1.6	Elect Director Huong Maria T. Kraus	Mgmt	For	For
1.7	Elect Director Robert M. Malcolm	Mgmt	For	For
1.8	Elect Director Kevin M. Ozan	Mgmt	For	For
1.9	Elect Director Anthony J. Palmer	Mgmt	For	For
1.10	Elect Director Juan R. Perez	Mgmt	For	For
1.11	Elect Director Cordel Robbin-Coker	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
4	Commission Third Party Supply Chain Assessment on Achieving a Living Income for Cocoa Farmers	SH	Against	Against
5	Report on Support for a Circular Economy for Packaging	SH	Against	Against

# AMETEK, Inc.

Meeting Date: 05/07/2024

Country: USA

Ticker: AME

Record Date: 03/08/2024

Meeting Type: Annual

Primary Security ID: 031100100

Shares Voted: 241,227

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Tod E. Carpenter	Mgmt	For	For
1b	Elect Director Karleen M. Oberton	Mgmt	For	For

## AMETEK, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1c	Elect Director Suzanne L. Stefany	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For

## Arthur J. Gallagher & Co.

**Meeting Date:** 05/07/2024      **Country:** USA      **Ticker:** AJG  
**Record Date:** 03/18/2024      **Meeting Type:** Annual  
**Primary Security ID:** 363576109

**Shares Voted:** 442,341

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Sherry Barrat	Mgmt	For	For
1b	Elect Director Deborah Caplan	Mgmt	For	For
1c	Elect Director Teresa Clarke	Mgmt	For	For
1d	Elect Director John Coldman	Mgmt	For	For
1e	Elect Director Pat Gallagher	Mgmt	For	For
1f	Elect Director David Johnson	Mgmt	For	For
1g	Elect Director Chris Miskel	Mgmt	For	For
1h	Elect Director Ralph Nicoletti	Mgmt	For	For
1i	Elect Director Norman Rosenthal	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Danaher Corporation

**Meeting Date:** 05/07/2024      **Country:** USA      **Ticker:** DHR  
**Record Date:** 03/08/2024      **Meeting Type:** Annual  
**Primary Security ID:** 235851102

**Shares Voted:** 230,874

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Rainer M. Blair	Mgmt	For	For

## Danaher Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1b	Elect Director Feroz Dewan	Mgmt	For	For
1c	Elect Director Linda Filler	Mgmt	For	For
1d	Elect Director Teri List	Mgmt	For	For
1e	Elect Director Jessica L. Mega	Mgmt	For	For
1f	Elect Director Mitchell P. Rales	Mgmt	For	For
1g	Elect Director Steven M. Rales	Mgmt	For	For
1h	Elect Director Pardis C. Sabeti	Mgmt	For	For
1i	Elect Director A. Shane Sanders	Mgmt	For	For
1j	Elect Director John T. Schwieters	Mgmt	For	For
1k	Elect Director Alan G. Spoon	Mgmt	For	For
1l	Elect Director Raymond C. Stevens	Mgmt	For	For
1m	Elect Director Elias A. Zerhouni	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	Against
5	Report on Effectiveness of Diversity, Equity, and Inclusion Efforts	SH	Against	Against

## CME Group Inc.

**Meeting Date:** 05/09/2024

**Country:** USA

**Ticker:** CME

**Record Date:** 03/11/2024

**Meeting Type:** Annual

**Primary Security ID:** 12572Q105

**Shares Voted:** 511,858

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Terrence A. Duffy	Mgmt	For	For
1b	Elect Director Kathryn Benesh	Mgmt	For	For
1c	Elect Director Timothy S. Bitsberger	Mgmt	For	For
1d	Elect Director Charles P. Carey	Mgmt	For	For
1e	Elect Director Bryan T. Durkin	Mgmt	For	For

## CME Group Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1f	Elect Director Harold Ford, Jr.	Mgmt	For	For
1g	Elect Director Martin J. Gepsman	Mgmt	For	For
1h	Elect Director Larry G. Gerdes	Mgmt	For	For
1i	Elect Director Daniel R. Glickman	Mgmt	For	For
1j	Elect Director Daniel G. Kaye	Mgmt	For	For
1k	Elect Director Phyllis M. Lockett	Mgmt	For	For
1l	Elect Director Deborah J. Lucas	Mgmt	For	For
1m	Elect Director Terry L. Savage	Mgmt	For	For
1n	Elect Director Rahael Seifu	Mgmt	For	For
1o	Elect Director William R. Shepard	Mgmt	For	For
1p	Elect Director Howard J. Siegel	Mgmt	For	For
1q	Elect Director Dennis A. Suskind	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Verizon Communications Inc.

**Meeting Date:** 05/09/2024      **Country:** USA      **Ticker:** VZ  
**Record Date:** 03/11/2024      **Meeting Type:** Annual  
**Primary Security ID:** 92343V104

**Shares Voted:** 2,089,959

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Shellye Archambeau	Mgmt	For	For
1.2	Elect Director Roxanne Austin	Mgmt	For	For
1.3	Elect Director Mark Bertolini	Mgmt	For	For
1.4	Elect Director Vittorio Colao	Mgmt	For	For
1.5	Elect Director Laxman Narasimhan	Mgmt	For	For
1.6	Elect Director Clarence Otis, Jr.	Mgmt	For	For
1.7	Elect Director Daniel Schulman	Mgmt	For	For
1.8	Elect Director Rodney Slater	Mgmt	For	For

## Verizon Communications Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.9	Elect Director Carol Tome	Mgmt	For	For
1.10	Elect Director Hans Vestberg	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Commission Third Party Study on Impact of Prohibiting Direct and Indirect Political Contributions to Candidates	SH	Against	Against
5	Report on Lobbying Payments and Policy	SH	Against	Against
6	Amend Clawback Policy	SH	Against	For
7	Require Independent Board Chair	SH	Against	For
8	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against
9	Report on Lead-Sheathed Cables	SH	Against	Abstain
10	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	Against

## Tradeweb Markets Inc.

**Meeting Date:** 05/10/2024

**Country:** USA

**Ticker:** TW

**Record Date:** 03/13/2024

**Meeting Type:** Annual

**Primary Security ID:** 892672106

**Shares Voted:** 305,956

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Jacques Aigrain	Mgmt	For	For
1.2	Elect Director Balbir Bakhshi	Mgmt	For	For
1.3	Elect Director Paula Madoff	Mgmt	For	For
1.4	Elect Director Thomas Pluta	Mgmt	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year

## State Street Corporation

Meeting Date: 05/15/2024

Country: USA

Ticker: STT

Record Date: 03/18/2024

Meeting Type: Annual

Primary Security ID: 857477103

Shares Voted: 568,235

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Patrick de Saint-Aignan	Mgmt	For	For
1b	Elect Director Marie A. Chandoha	Mgmt	For	For
1c	Elect Director DonnaLee A. DeMaio	Mgmt	For	For
1d	Elect Director Amelia C. Fawcett	Mgmt	For	For
1e	Elect Director William C. Freda	Mgmt	For	For
1f	Elect Director Sara Mathew	Mgmt	For	For
1g	Elect Director William L. Meaney	Mgmt	For	For
1h	Elect Director Ronald P. O'Hanley	Mgmt	For	For
1i	Elect Director Sean P. O'Sullivan	Mgmt	For	For
1j	Elect Director Julio A. Portalatin	Mgmt	For	For
1k	Elect Director John B. Rhea	Mgmt	For	For
1l	Elect Director Gregory L. Summe	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For

## Verisk Analytics, Inc.

Meeting Date: 05/15/2024

Country: USA

Ticker: VRSK

Record Date: 03/18/2024

Meeting Type: Annual

Primary Security ID: 92345Y106

Shares Voted: 372,669

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Vincent K. Brooks	Mgmt	For	For
1b	Elect Director Jeffrey Dailey	Mgmt	For	For
1c	Elect Director Bruce Hansen	Mgmt	For	For

## Verisk Analytics, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1d	Elect Director Gregory Hendrick	Mgmt	For	For
1e	Elect Director Kathleen A. Hogenson	Mgmt	For	For
1f	Elect Director Wendy Lane	Mgmt	For	For
1g	Elect Director Samuel G. Liss	Mgmt	For	For
1h	Elect Director Lee M. Shavel	Mgmt	For	For
1i	Elect Director Olumide Soroye	Mgmt	For	For
1j	Elect Director Kimberly S. Stevenson	Mgmt	For	For
1k	Elect Director Therese M. Vaughan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Adopt Simple Majority Vote	SH	None	For

## Amphenol Corporation

**Meeting Date:** 05/16/2024

**Country:** USA

**Ticker:** APH

**Record Date:** 03/18/2024

**Meeting Type:** Annual

**Primary Security ID:** 032095101

**Shares Voted:** 1,486,998

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Nancy A. Altobello	Mgmt	For	For
1.2	Elect Director David P. Falck	Mgmt	For	For
1.3	Elect Director Edward G. Jepsen	Mgmt	For	For
1.4	Elect Director Rita S. Lane	Mgmt	For	For
1.5	Elect Director Robert A. Livingston	Mgmt	For	For
1.6	Elect Director Martin H. Loeffler	Mgmt	For	For
1.7	Elect Director R. Adam Norwitt	Mgmt	For	For
1.8	Elect Director Prahlad Singh	Mgmt	For	For
1.9	Elect Director Anne Clarke Wolff	Mgmt	For	Against
2	Approve Non-Employee Director Restricted Stock Plan	Mgmt	For	For

## Amphenol Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
5	Amend Certificate of Incorporation to Reflect New Delaware Law Provisions Regarding Officer Exculpation	Mgmt	For	For
6	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For

## Marsh & McLennan Companies, Inc.

**Meeting Date:** 05/16/2024      **Country:** USA      **Ticker:** MMC  
**Record Date:** 03/18/2024      **Meeting Type:** Annual  
**Primary Security ID:** 571748102

Shares Voted: 683,220

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Anthony K. Anderson	Mgmt	For	For
1b	Elect Director John Q. Doyle	Mgmt	For	For
1c	Elect Director Oscar Fanjul	Mgmt	For	For
1d	Elect Director H. Edward Hanway	Mgmt	For	For
1e	Elect Director Judith Hartmann	Mgmt	For	For
1f	Elect Director Deborah C. Hopkins	Mgmt	For	For
1g	Elect Director Tamara Ingram	Mgmt	For	For
1h	Elect Director Jane H. Lute	Mgmt	For	For
1i	Elect Director Steven A. Mills	Mgmt	For	For
1j	Elect Director Morton O. Schapiro	Mgmt	For	For
1k	Elect Director Lloyd M. Yates	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Provide Right to Act by Written Consent	SH	Against	For

## Martin Marietta Materials, Inc.

Meeting Date: 05/16/2024

Country: USA

Ticker: MLM

Record Date: 03/07/2024

Meeting Type: Annual

Primary Security ID: 573284106

Shares Voted: 143,951

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Dorothy M. Ables	Mgmt	For	For
1.2	Elect Director Sue W. Cole	Mgmt	For	For
1.3	Elect Director Anthony R. Foxx	Mgmt	For	For
1.4	Elect Director John J. Koraleski	Mgmt	For	For
1.5	Elect Director Mary T. Mack	Mgmt	For	For
1.6	Elect Director C. Howard Nye	Mgmt	For	For
1.7	Elect Director Laree E. Perez	Mgmt	For	For
1.8	Elect Director Thomas H. Pike	Mgmt	For	For
1.9	Elect Director Donald W. Slager	Mgmt	For	For
1.10	Elect Director David C. Wajsgras	Mgmt	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Intercontinental Exchange, Inc.

Meeting Date: 05/17/2024

Country: USA

Ticker: ICE

Record Date: 03/21/2024

Meeting Type: Annual

Primary Security ID: 45866F104

Shares Voted: 583,184

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Sharon Y. Bowen	Mgmt	For	For
1b	Elect Director Shantella E. Cooper	Mgmt	For	For
1c	Elect Director Duriya M. Farooqui	Mgmt	For	For
1d	Elect Director The Right Hon. the Lord Hague of Richmond	Mgmt	For	For
1e	Elect Director Mark F. Mulhern	Mgmt	For	For
1f	Elect Director Thomas E. Noonan	Mgmt	For	For
1g	Elect Director Caroline L. Silver	Mgmt	For	For

## Intercontinental Exchange, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1h	Elect Director Jeffrey C. Sprecher	Mgmt	For	For
1i	Elect Director Judith A. Sprieser	Mgmt	For	For
1j	Elect Director Martha A. Tirinnanzi	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Require Independent Board Chair	SH	Against	For

## CDW Corporation

**Meeting Date:** 05/21/2024      **Country:** USA      **Ticker:** CDW  
**Record Date:** 03/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** 12514G108

**Shares Voted:** 74,900

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Virginia C. Addicott	Mgmt	For	For
1b	Elect Director James A. Bell	Mgmt	For	For
1c	Elect Director Lynda M. Clarizio	Mgmt	For	For
1d	Elect Director Anthony R. Foxx	Mgmt	For	For
1e	Elect Director Kelly J. Grier	Mgmt	For	For
1f	Elect Director Marc E. Jones	Mgmt	For	For
1g	Elect Director Christine A. Leahy	Mgmt	For	For
1h	Elect Director Sanjay Mehrotra	Mgmt	For	For
1i	Elect Director David W. Nelms	Mgmt	For	For
1j	Elect Director Joseph R. Swedish	Mgmt	For	For
1k	Elect Director Donna F. Zarcone	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Report on Political Contributions	SH	Against	Against

**Meeting Date:** 05/21/2024

**Country:** USA

**Ticker:** JPM

**Record Date:** 03/22/2024

**Meeting Type:** Annual

**Primary Security ID:** 46625H100

**Shares Voted:** 272,526

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	For	For
1b	Elect Director Stephen B. Burke	Mgmt	For	For
1c	Elect Director Todd A. Combs	Mgmt	For	For
1d	Elect Director Alicia Boler Davis	Mgmt	For	For
1e	Elect Director James Dimon	Mgmt	For	For
1f	Elect Director Alex Gorsky	Mgmt	For	For
1g	Elect Director Mellody Hobson	Mgmt	For	For
1h	Elect Director Phebe N. Novakovic	Mgmt	For	For
1i	Elect Director Virginia M. Rometty	Mgmt	For	For
1j	Elect Director Mark A. Weinberger	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
5	Require Independent Board Chair	SH	Against	Against
6	Report on Impacts of JPMC's Climate Transition Policies	SH	Against	Against
7	Report on Respecting Indigenous Peoples' Rights	SH	Against	Against
8	Review Proxy Voting Record and Policies Related to Climate Change and Diversity	SH	Against	Against
9	Commission Third Party Report on Due Diligence Process of Doing Business in Conflict Affected Areas	SH	Against	Against
10	Submit Severance Agreement to Shareholder Vote	SH	Against	Against
11	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against

Meeting Date: 05/22/2024

Country: USA

Ticker: AMZN

Record Date: 03/28/2024

Meeting Type: Annual

Primary Security ID: 023135106

Shares Voted: 593,527

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jeffrey P. Bezos	Mgmt	For	For
1b	Elect Director Andrew R. Jassy	Mgmt	For	For
1c	Elect Director Keith B. Alexander	Mgmt	For	For
1d	Elect Director Edith W. Cooper	Mgmt	For	For
1e	Elect Director Jamie S. Gorelick	Mgmt	For	For
1f	Elect Director Daniel P. Huttenlocher	Mgmt	For	For
1g	Elect Director Andrew Y. Ng	Mgmt	For	For
1h	Elect Director Indra K. Nooyi	Mgmt	For	For
1i	Elect Director Jonathan J. Rubinstein	Mgmt	For	For
1j	Elect Director Brad D. Smith	Mgmt	For	For
1k	Elect Director Patricia Q. Stonesifer	Mgmt	For	For
1l	Elect Director Wendell P. Weeks	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Establish a Public Policy Committee	SH	Against	Against
5	Establish a Board Committee on Corporate Financial Sustainability	SH	Against	Against
6	Report on Customer Due Diligence	SH	Against	Against
7	Report on Lobbying Payments and Policy	SH	Against	Against
8	Report on Median and Adjusted Gender/Racial Pay Gaps	SH	Against	Against
9	Report on Viewpoint Discrimination	SH	Against	Against
10	Report on Impact of Climate Change Strategy Consistent With Just Transition Guidelines	SH	Against	Against
11	Report on Efforts to Reduce Plastic Use	SH	Against	For

## Amazon.com, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
12	Commission Third Party Assessment on Company's Commitment to Freedom of Association and Collective Bargaining	SH	Against	Against
13	Disclose All Material Scope 3 GHG Emissions	SH	Against	Against
14	Commission Third Party Study and Report on Risks Associated with Use of Rekognition	SH	Against	Against
15	Adopt Policy to Require Board Members to Disclose their Political and Charitable Donations	SH	Against	Against
16	Establish a Board Committee on Artificial Intelligence	SH	Against	Against
17	Commission a Third Party Audit on Working Conditions	SH	Against	Against

## The Southern Company

Meeting Date: 05/22/2024

Country: USA

Ticker: SO

Record Date: 03/25/2024

Meeting Type: Annual

Primary Security ID: 842587107

Shares Voted: 496,246

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Janaki Akella	Mgmt	For	For
1b	Elect Director Henry A. "Hal" Clark, III	Mgmt	For	For
1c	Elect Director Shantella E. Cooper	Mgmt	For	For
1d	Elect Director Anthony F. "Tony" Earley, Jr.	Mgmt	For	For
1e	Elect Director David J. Grain	Mgmt	For	For
1f	Elect Director Donald M. James	Mgmt	For	For
1g	Elect Director John D. Johns	Mgmt	For	For
1h	Elect Director Dale E. Klein	Mgmt	For	For
1i	Elect Director David E. Meador	Mgmt	For	For
1j	Elect Director William G. Smith, Jr.	Mgmt	For	For
1k	Elect Director Kristine L. Svinicki	Mgmt	For	For
1l	Elect Director Lizanne Thomas	Mgmt	For	For

## The Southern Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1m	Elect Director Christopher C. Womack	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For
5	Adopt Simple Majority Vote	SH	Against	For
6	Adopt GHG Emissions Reduction Targets Aligned with the Paris Agreement Goal	SH	Against	Against

## Willis Towers Watson Public Limited Company

**Meeting Date:** 05/22/2024      **Country:** Ireland      **Ticker:** WTW  
**Record Date:** 03/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** G96629103

Shares Voted: 76,623

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Dame Inga Beale	Mgmt	For	For
1b	Elect Director Fumbi Chima	Mgmt	For	For
1c	Elect Director Stephen Chipman	Mgmt	For	For
1d	Elect Director Michael Hammond	Mgmt	For	For
1e	Elect Director Carl Hess	Mgmt	For	For
1f	Elect Director Jacqueline Hunt	Mgmt	For	For
1g	Elect Director Paul Reilly	Mgmt	For	For
1h	Elect Director Michelle Swanback	Mgmt	For	For
1i	Elect Director Paul Thomas	Mgmt	For	For
1j	Elect Director Fredric Tomczyk	Mgmt	For	For
2	Ratify the Appointment of Deloitte & Touche LLP as Auditor and Deloitte Ireland LLP to audit the Irish Statutory Accounts, and Authorize the Board to Fix Their Remuneration	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Willis Towers Watson Public Limited Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
4	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For
5	Renew the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights	Mgmt	For	For

## Waters Corporation

**Meeting Date:** 05/23/2024      **Country:** USA      **Ticker:** WAT  
**Record Date:** 03/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** 941848103

**Shares Voted:** 280,958

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Flemming Ornskov	Mgmt	For	For
1.2	Elect Director Linda Baddour	Mgmt	For	For
1.3	Elect Director Udit Batra	Mgmt	For	For
1.4	Elect Director Dan Brennan	Mgmt	For	For
1.5	Elect Director Richard Fearon	Mgmt	For	For
1.6	Elect Director Pearl S. Huang	Mgmt	For	For
1.7	Elect Director Wei Jiang	Mgmt	For	For
1.8	Elect Director Christopher A. Kuebler	Mgmt	For	For
1.9	Elect Director Mark Vergnano	Mgmt	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
4	Amend Certificate of Incorporation to Reflect New Delaware Law Provisions Regarding Officer Exculpation	Mgmt	For	For

## Dollar General Corporation

**Meeting Date:** 05/29/2024      **Country:** USA      **Ticker:** DG  
**Record Date:** 03/20/2024      **Meeting Type:** Annual  
**Primary Security ID:** 256677105

# Dollar General Corporation

Shares Voted: 240,401

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Warren F. Bryant	Mgmt	For	For
1b	Elect Director Michael M. Calbert	Mgmt	For	For
1c	Elect Director Ana M. Chadwick	Mgmt	For	For
1d	Elect Director Patricia D. Fili-Krushel	Mgmt	For	For
1e	Elect Director Timothy I. McGuire	Mgmt	For	For
1f	Elect Director David P. Rowland	Mgmt	For	For
1g	Elect Director Debra A. Sandler	Mgmt	For	For
1h	Elect Director Ralph E. Santana	Mgmt	For	For
1i	Elect Director Todd J. Vasos	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Amend Clawback Policy	SH	Against	Against

# UnitedHealth Group Incorporated

Meeting Date: 06/03/2024

Country: USA

Ticker: UNH

Record Date: 04/05/2024

Meeting Type: Annual

Primary Security ID: 91324P102

Shares Voted: 174,091

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	For	For
1b	Elect Director Timothy Flynn	Mgmt	For	For
1c	Elect Director Paul Garcia	Mgmt	For	For
1d	Elect Director Kristen Gil	Mgmt	For	For
1e	Elect Director Stephen Hemsley	Mgmt	For	For
1f	Elect Director Michele Hooper	Mgmt	For	For
1g	Elect Director F. William McNabb, III	Mgmt	For	For
1h	Elect Director Valerie Montgomery Rice	Mgmt	For	For

## UnitedHealth Group Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1i	Elect Director John Noseworthy	Mgmt	For	For
1j	Elect Director Andrew Witty	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	Against

## Cognizant Technology Solutions Corporation

Meeting Date: 06/04/2024

Country: USA

Ticker: CTSH

Record Date: 04/08/2024

Meeting Type: Annual

Primary Security ID: 192446102

Shares Voted: 529,055

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Zein Abdalla	Mgmt	For	For
1b	Elect Director Vinita Bali	Mgmt	For	For
1c	Elect Director Eric Branderiz	Mgmt	For	For
1d	Elect Director Archana Deskus	Mgmt	For	For
1e	Elect Director John M. Dineen	Mgmt	For	For
1f	Elect Director Ravi Kumar S	Mgmt	For	For
1g	Elect Director Leo S. Mackay, Jr.	Mgmt	For	For
1h	Elect Director Michael Patsalos-Fox	Mgmt	For	For
1i	Elect Director Stephen "Steve" J. Rohleder	Mgmt	For	For
1j	Elect Director Abraham "Bram" Schot	Mgmt	For	For
1k	Elect Director Joseph M. Velli	Mgmt	For	For
1l	Elect Director Sandra S. Wijnberg	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Cognizant Technology Solutions Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
3	Amend Certificate of Incorporation to Reflect New Delaware Law Provisions Regarding Officer Exculpation and to Remove Obsolete Provisions	Mgmt	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
5	Adopt Policy on Fair Treatment of Shareholder Nominees	SH	Against	Against

## FTI Consulting, Inc.

**Meeting Date:** 06/05/2024      **Country:** USA      **Ticker:** FCN  
**Record Date:** 03/07/2024      **Meeting Type:** Annual  
**Primary Security ID:** 302941109

**Shares Voted:** 239,268

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Brenda J. Bacon	Mgmt	For	For
1b	Elect Director Mark S. Bartlett	Mgmt	For	For
1c	Elect Director Elsy Boglioli	Mgmt	For	For
1d	Elect Director Claudio Costamagna	Mgmt	For	For
1e	Elect Director Nicholas C. Fanandakis	Mgmt	For	For
1f	Elect Director Steven H. Gunby	Mgmt	For	For
1g	Elect Director Gerard E. Holthaus	Mgmt	For	For
1h	Elect Director Stephen C. Robinson	Mgmt	For	For
1i	Elect Director Lauren E. Seeger	Mgmt	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Allegion Plc

**Meeting Date:** 06/06/2024      **Country:** Ireland      **Ticker:** ALLE  
**Record Date:** 04/11/2024      **Meeting Type:** Annual  
**Primary Security ID:** G0176J109

## Allegion Plc

Shares Voted: 268,409

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Kirk S. Hachigian	Mgmt	For	For
1b	Elect Director Susan L. Main	Mgmt	For	For
1c	Elect Director Steven C. Mizell	Mgmt	For	For
1d	Elect Director Nicole Parent Haughey	Mgmt	For	For
1e	Elect Director Lauren B. Peters	Mgmt	For	For
1f	Elect Director Ellen Rubin	Mgmt	For	For
1g	Elect Director John H. Stone	Mgmt	For	For
1h	Elect Director Dev Vardhan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers as Auditors and Authorise Their Remuneration	Mgmt	For	For
4	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For
5	Renew the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights	Mgmt	For	For

## Mastercard Incorporated

Meeting Date: 06/18/2024

Country: USA

Ticker: MA

Record Date: 04/19/2024

Meeting Type: Annual

Primary Security ID: 57636Q104

Shares Voted: 174,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Merit E. Janow	Mgmt	For	For
1b	Elect Director Candido Bracher	Mgmt	For	For
1c	Elect Director Richard K. Davis	Mgmt	For	For
1d	Elect Director Julius Genachowski	Mgmt	For	For
1e	Elect Director Choon Phong Goh	Mgmt	For	For
1f	Elect Director Oki Matsumoto	Mgmt	For	For
1g	Elect Director Michael Miebach	Mgmt	For	For
1h	Elect Director Youngme Moon	Mgmt	For	For

## Mastercard Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1i	Elect Director Rima Qureshi	Mgmt	For	For
1j	Elect Director Gabrielle Sulzberger	Mgmt	For	For
1k	Elect Director Harit Talwar	Mgmt	For	For
1l	Elect Director Lance Uggla	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Report on Lobbying Payments and Policy	SH	Against	Against
5	Amend Director Election Resignation Bylaw	SH	Against	Against
6	Report on Congruency of Company's Privacy and Human Rights Policies with its Actions	SH	Against	Against
7	Report on Congruency of Company's Human Rights Statement with Charitable Contributions and Voluntary Partnerships	SH	Against	Against
8	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against

## NIKE, Inc.

Meeting Date: 09/10/2024

Country: USA

Ticker: NKE

Record Date: 07/10/2024

Meeting Type: Annual

Primary Security ID: 654106103

Shares Voted: 751,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Cathleen Benko	Mgmt	For	For
1b	Elect Director John Rogers, Jr.	Mgmt	For	Withhold
1c	Elect Director Robert Swan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Report on Median Gender/Racial Pay Gaps	SH	Against	For

## NIKE, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
5	Report on Effectiveness of Supply Chain Management on Equity Goals and Human Rights Commitments	SH	Against	Against
6	Report on the Impact of Work-Driven Responsibility Principles and Supporting Binding Agreements in Sourcing from High-Risk Countries	SH	Against	Against
7	Report on Environmental Targets	SH	Against	Against
8	Report on Congruency of Voluntary Partnerships with Company's Fiduciary Duties	SH	Against	Against

## The Procter & Gamble Company

Meeting Date: 10/08/2024

Country: USA

Ticker: PG

Record Date: 08/09/2024

Meeting Type: Annual

Primary Security ID: 742718109

Shares Voted: 618,446

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director B. Marc Allen	Mgmt	For	For
1b	Elect Director Brett Biggs	Mgmt	For	For
1c	Elect Director Sheila Bonini	Mgmt	For	For
1d	Elect Director Amy L. Chang	Mgmt	For	For
1e	Elect Director Joseph Jimenez	Mgmt	For	For
1f	Elect Director Christopher Kempczinski	Mgmt	For	For
1g	Elect Director Debra L. Lee	Mgmt	For	For
1h	Elect Director Terry J. Lundgren	Mgmt	For	For
1i	Elect Director Christine M. McCarthy	Mgmt	For	For
1j	Elect Director Ashley McEvoy	Mgmt	For	For
1k	Elect Director Jon R. Moeller	Mgmt	For	For
1l	Elect Director Robert J. Portman	Mgmt	For	For
1m	Elect Director Rajesh Subramaniam	Mgmt	For	For
1n	Elect Director Patricia A. Woertz	Mgmt	For	For

## The Procter & Gamble Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Report on Median Gender/Racial Pay Gap	SH	Against	Against

## Paychex, Inc.

**Meeting Date:** 10/10/2024      **Country:** USA      **Ticker:** PAYX  
**Record Date:** 08/12/2024      **Meeting Type:** Annual  
**Primary Security ID:** 704326107

**Shares Voted:** 525,838

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Martin Mucci	Mgmt	For	For
1b	Elect Director Thomas F. Bonadio	Mgmt	For	For
1c	Elect Director Joseph G. Doody	Mgmt	For	For
1d	Elect Director John B. Gibson	Mgmt	For	For
1e	Elect Director B. Thomas Golisano	Mgmt	For	For
1f	Elect Director Pamela A. Joseph	Mgmt	For	For
1g	Elect Director Theresa M. Payton	Mgmt	For	For
1h	Elect Director Kevin A. Price	Mgmt	For	For
1i	Elect Director Joseph M. Tucci	Mgmt	For	For
1j	Elect Director Joseph M. Velli	Mgmt	For	For
1k	Elect Director Kara Wilson	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## The Estee Lauder Companies Inc.

**Meeting Date:** 11/08/2024      **Country:** USA      **Ticker:** EL  
**Record Date:** 09/09/2024      **Meeting Type:** Annual  
**Primary Security ID:** 518439104

# The Estee Lauder Companies Inc.

Shares Voted: 135,805

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Paul J. Fribourg	Mgmt	For	For
1b	Elect Director Jennifer Hyman	Mgmt	For	Withhold
1c	Elect Director Arturo Nunez	Mgmt	For	For
1d	Elect Director Barry S. Sternlicht	Mgmt	For	Withhold
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
4	Amend Omnibus Stock Plan	Mgmt	For	Against

# Microsoft Corporation

Meeting Date: 12/10/2024

Country: USA

Ticker: MSFT

Record Date: 09/30/2024

Meeting Type: Annual

Primary Security ID: 594918104

Shares Voted: 377,800

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Reid G. Hoffman	Mgmt	For	For
1.2	Elect Director Hugh F. Johnston	Mgmt	For	For
1.3	Elect Director Teri L. List	Mgmt	For	For
1.4	Elect Director Catherine MacGregor	Mgmt	For	For
1.5	Elect Director Mark A. L. Mason	Mgmt	For	For
1.6	Elect Director Satya Nadella	Mgmt	For	For
1.7	Elect Director Sandra E. Peterson	Mgmt	For	For
1.8	Elect Director Penny S. Pritzker	Mgmt	For	For
1.9	Elect Director Carlos A. Rodriguez	Mgmt	For	For
1.10	Elect Director Charles W. Scharf	Mgmt	For	For
1.11	Elect Director John W. Stanton	Mgmt	For	For
1.12	Elect Director Emma N. Walmsley	Mgmt	For	For

# Microsoft Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Report on Risks of Weapons Development	SH	Against	Against
5	Assess and Report on Investing in Bitcoin	SH	Against	Against
6	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Against	For
7	Report on Risks of Using Artificial Intelligence and Machine Learning Tools for Oil and Gas Development and Production	SH	Against	Against
8	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Against	Against
9	Report on AI Data Sourcing Accountability	SH	Against	For