

# Stewardship \*\at a Glance

Here's a snapshot of what's included in our latest Annual Stewardship Report. You'll find details of our Thoughtful Investment approach, Sustainability Metrics for our Thoughtful Fund range, Engagement Case Studies and Voting Activity.

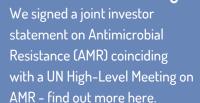
## THE THOUGHTFUL INVESTOR ®

Learn more about our
Thoughtful Investor Approach
B.E.S.T. framework and the
Sustainability Metrics used to
monitor our Thoughtful Fund
Range - click here.

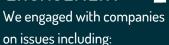
#### **ACTIVE VOTING**

We actively voted to represent the views of our clients, with 1,736 resolutions voted on at 124 meetings. Learn more <u>here</u>.

## COLLABORATIVE ACTION



## WORKFORCE ENGAGEMENT



- Executive pay
- Modern slavery
- Mental health
- Net zero & climate risks

## SUPPORTING CLIENT VULNERABILITY

Joined Financial Vulnerability
Taskforce Charter recognising
the additional risks clients in
vulnerable circumstances face
and taking active steps to
address them

### CISI CHARTERED FIRM™

Castlefield achieved CISI
Chartered Firm™ status in
demonstrating highest levels of
professionalism, ethics, and
commitment to excellence

## ENGAGEMENT CASE STUDIES FROM:

- The Gym Group
- <u>Unilever</u>
- Schneider Electric
- <u>Unicredit</u>
- Britvic



## ABOUT CASTLEFIELD



We're an award-winning, ethical investment and advice group that's part-owned by a grant-making charitable foundation. Learn more about us here.

#### BEST ESG ADVISER



Winner of 'Best Adviser firm for ESG' and named as one of the 'Best Financial Advisers to Work For' (Professional Adviser Awards)

## EMPLOYEE OWNED



Castlefield is proudly employeeowned. We're also a Disability Confident, Living Wage and Age-Friendly employer.

