

VOTE SUMMARY REPORT

Date range covered : 07/01/2024 to 06/30/2025

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): EDUCATORS FINANCIAL GROUP INC.

NIKE, Inc.

Meeting Date: 09/10/2024Country: USATicker: NKE

Record Date: 07/10/2024Meeting Type: Annual

Primary Security ID: 654106103

Shares Voted: 7,850

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cathleen Benko	Mgmt	For	For	For	For
1b	Elect Director John Rogers, Jr.	Mgmt	For	Withhold	Withhold	Withhold
1c	Elect Director Robert Swan	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
4	Report on Median Gender/Racial Pay Gaps	SH	Against	For	For	For
5	Report on Effectiveness of Supply Chain Management on Equity Goals and Human Rights Commitments	SH	Against	Against	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	Against	Against
7	Report on Environmental Targets	SH	Against	For	For	Against
8	Report on Congruency of Voluntary Partnerships with Company's Fiduciary Duties	SH	Against	Against	Against	Against

The Procter & Gamble Company

Meeting Date: 10/08/2024Country: USATicker: PG

Record Date: 08/09/2024Meeting Type: Annual

Primary Security ID: 742718109

Shares Voted: 6,110

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director B. Marc Allen	Mgmt	For	For	For	For

The Procter & Gamble Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Brett Biggs	Mgmt	For	For	For	For
1c	Elect Director Sheila Bonini	Mgmt	For	For	For	For
1d	Elect Director Amy L. Chang	Mgmt	For	For	For	For
1e	Elect Director Joseph Jimenez	Mgmt	For	For	For	For
1f	Elect Director Christopher Kempczinski	Mgmt	For	For	For	For
1g	Elect Director Debra L. Lee	Mgmt	For	For	For	For
1h	Elect Director Terry J. Lundgren	Mgmt	For	For	For	For
1i	Elect Director Christine M. McCarthy	Mgmt	For	For	For	For
1j	Elect Director Ashley McEvoy	Mgmt	For	For	For	For
1k	Elect Director Jon R. Moeller	Mgmt	For	For	For	For
1l	Elect Director Robert J. Portman	Mgmt	For	For	For	For
1m	Elect Director Rajesh Subramaniam	Mgmt	For	For	For	For
1n	Elect Director Patricia A. Woertz	Mgmt	For	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
4	Report on Median Gender/Racial Pay Gap	SH	Against	For	For	Against

Paychex, Inc.

Meeting Date: 10/10/2024

Record Date: 08/12/2024

Primary Security ID: 704326107

Country: USA

Meeting Type: Annual

Ticker: PAYX

Shares Voted: 5,714

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Martin Mucci	Mgmt	For	For	For	For
1b	Elect Director Thomas F. Bonadio	Mgmt	For	For	For	For
1c	Elect Director Joseph G. Doody	Mgmt	For	For	For	For
1d	Elect Director John B. Gibson	Mgmt	For	For	For	For
1e	Elect Director B. Thomas Golisano	Mgmt	For	For	For	For

Paychex, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Pamela A. Joseph	Mgmt	For	For	For	For
1g	Elect Director Theresa M. Payton	Mgmt	For	For	For	For
1h	Elect Director Kevin A. Price	Mgmt	For	For	For	For
1i	Elect Director Joseph M. Tucci	Mgmt	For	For	For	For
1j	Elect Director Joseph M. Velli	Mgmt	For	For	For	For
1k	Elect Director Kara Wilson	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For

The Estee Lauder Companies Inc.

Meeting Date: 11/08/2024Country: USATicker: EL

Record Date: 09/09/2024Meeting Type: Annual

Primary Security ID: 518439104

Shares Voted: 1,536						
Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paul J. Fribourg	Mgmt	For	For	For	For
1b	Elect Director Jennifer Hyman	Mgmt	For	Withhold	Withhold	Withhold
1c	Elect Director Arturo Nunez	Mgmt	For	For	For	For
1d	Elect Director Barry S. Sternlicht	Mgmt	For	Withhold	Withhold	Withhold
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	Against
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against	Against

Microsoft Corporation

Meeting Date: 12/10/2024Country: USATicker: MSFT

Record Date: 09/30/2024Meeting Type: Annual

Primary Security ID: 594918104

Shares Voted: 4,010

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Reid G. Hoffman	Mgmt	For	For	For	For
1.2	Elect Director Hugh F. Johnston	Mgmt	For	For	For	For
1.3	Elect Director Teri L. List	Mgmt	For	For	For	For
1.4	Elect Director Catherine MacGregor	Mgmt	For	For	For	For
1.5	Elect Director Mark A. L. Mason	Mgmt	For	For	For	For
1.6	Elect Director Satya Nadella	Mgmt	For	For	For	For
1.7	Elect Director Sandra E. Peterson	Mgmt	For	For	For	For
1.8	Elect Director Penny S. Pritzker	Mgmt	For	For	For	For
1.9	Elect Director Carlos A. Rodriguez	Mgmt	For	For	For	For
1.10	Elect Director Charles W. Scharf	Mgmt	For	For	For	For
1.11	Elect Director John W. Stanton	Mgmt	For	For	For	For
1.12	Elect Director Emma N. Walmsley	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
4	Report on Risks of Weapons Development	SH	Against	Against	Against	Against
5	Assess and Report on Investing in Bitcoin	SH	Against	Against	Against	Against
6	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Against	For	For	For
7	Report on Risks of Using Artificial Intelligence and Machine Learning Tools for Oil and Gas Development and Production	SH	Against	Against	Against	Against
8	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Against	Against	Against	Against
9	Report on AI Data Sourcing Accountability	SH	Against	For	For	For

Becton, Dickinson and Company

Meeting Date: 01/28/2025

Record Date: 12/09/2024

Primary Security ID: 075887109

Country: USA

Meeting Type: Annual

Ticker: BDX

Shares Voted: 2,654

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

Visa Inc.

Meeting Date: 01/28/2025

Record Date: 12/02/2024

Primary Security ID: 92826C839

Country: USA

Meeting Type: Annual

Ticker: V

Shares Voted: 1

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For	For	For
1d	Elect Director Ramon Laguarta	Mgmt	For	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Teri L. List	Mgmt	For	For	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For	For	For
1g	Elect Director Ryan McInerney	Mgmt	For	For	For	For
1h	Elect Director Denise M. Morrison	Mgmt	For	For	For	For
1i	Elect Director Pamela Murphy	Mgmt	For	For	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For	For	For
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For	For
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against	Against	Against
5	Report on Company's Policy on Merchant Category Codes	SH	Against	Against	Against	Against
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against	Against
7	Report on Lobbying Payments and Policy	SH	Against	Against	Against	Against

Meeting Date: 02/06/2025
 Country: Ireland
 Ticker: ACN

Record Date: 12/09/2024
 Meeting Type: Annual

Primary Security ID: G1151C101

Shares Voted: 2,091						
Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jaime Ardila	Mgmt	For	For	For	For
1b	Elect Director Martin Brudermuller	Mgmt	For	For	For	For
1c	Elect Director Alan Jope	Mgmt	For	For	For	For
1d	Elect Director Nancy McKinstry	Mgmt	For	For	For	For
1e	Elect Director Jennifer Nason	Mgmt	For	For	For	For
1f	Elect Director Paula A. Price	Mgmt	For	For	For	For
1g	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For	For	For
1h	Elect Director Arun Sarin	Mgmt	For	For	For	For

Accenture plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Julie Sweet	Mgmt	For	For	For	For
1j	Elect Director Tracey T. Travis	Mgmt	For	For	For	For
1k	Elect Director Masahiko Uotani	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify KPMG LLP as Auditors and Authorise Their Remuneration	Mgmt	For	For	For	For
4	Approve Capital Reduction of the Share Premium Account	Mgmt	For	For	For	For
5	Authorize Board to Issue Shares under Irish Law	Mgmt	For	For	For	For
6	Authorize the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	For	For	For	For
7	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For	For

Cencora, Inc.

Meeting Date: 03/06/2025Country: USATicker: COR

Record Date: 01/10/2025Meeting Type: Annual

Primary Security ID: 03073E105

Shares Voted: 1

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ornella Barra	Mgmt	For	For	For	For
1b	Elect Director Werner Baumann	Mgmt	For	For	For	For
1c	Elect Director Frank K. Clyburn	Mgmt	For	For	For	For
1d	Elect Director Steven H. Collis	Mgmt	For	For	For	For
1e	Elect Director D. Mark Durcan	Mgmt	For	For	For	For
1f	Elect Director Lon R. Greenberg	Mgmt	For	For	For	For
1g	Elect Director Lorence H. Kim	Mgmt	For	For	For	For
1h	Elect Director Robert P. Mauch	Mgmt	For	For	For	For
1i	Elect Director Redonda G. Miller	Mgmt	For	For	For	For
1j	Elect Director Dennis M. Nally	Mgmt	For	For	For	For
1k	Elect Director Lauren M. Tyler	Mgmt	For	For	For	For

Cencora, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For

Carrier Global Corporation

**Meeting Date:** 04/09/2025

**Country:** USA

**Ticker:** CARR

**Record Date:** 02/13/2025

**Meeting Type:** Annual

**Primary Security ID:** 14448C104

Shares Voted: 2,549

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jean-Pierre Garnier	Mgmt	For	For	For	For
1b	Elect Director David L. Gitlin	Mgmt	For	For	For	For
1c	Elect Director John J. Greisch	Mgmt	For	For	For	For
1d	Elect Director Charles M. Holley, Jr.	Mgmt	For	For	For	For
1e	Elect Director Michael M. McNamara	Mgmt	For	For	For	For
1f	Elect Director Amy E. Miles	Mgmt	For	For	For	For
1g	Elect Director Susan N. Story	Mgmt	For	For	For	For
1h	Elect Director Michael A. Todman	Mgmt	For	For	For	For
1i	Elect Director Maximilian (Max) Viessmann	Mgmt	For	For	For	For
1j	Elect Director Virginia M. Wilson	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
5	Report on Lobbying Payments and Policy	SH	Against	Against	Against	Against

The Sherwin-Williams Company

**Meeting Date:** 04/16/2025

**Country:** USA

**Ticker:** SHW

**Record Date:** 02/19/2025

**Meeting Type:** Annual

**Primary Security ID:** 824348106



## The Sherwin-Williams Company

Shares Voted: 1,810

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kerrii B. Anderson	Mgmt	For	For	For	For
1b	Elect Director Jeff M. Fettig	Mgmt	For	For	For	For
1c	Elect Director Robert J. Gamgort	Mgmt	For	For	For	For
1d	Elect Director Heidi G. Petz	Mgmt	For	For	For	For
1e	Elect Director Aaron M. Powell	Mgmt	For	For	For	For
1f	Elect Director Marta R. Stewart	Mgmt	For	For	For	For
1g	Elect Director Michael H. Thaman	Mgmt	For	For	For	For
1h	Elect Director Matthew Thornton, III	Mgmt	For	For	For	For
1i	Elect Director Thomas L. Williams	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Approve Omnibus Stock Plan	Mgmt	For	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
5	Eliminate Supermajority Vote Requirement of Paragraph (B) of Article Sixth of the Charter	Mgmt	For	For	For	For
6	Eliminate Supermajority Vote Requirement of Section 6(b) of Article Fourth, Division A of the Charter	Mgmt	For	For	For	For

## Texas Instruments Incorporated

Meeting Date: 04/17/2025

Record Date: 02/20/2025

Primary Security ID: 882508104

Country: USA

Meeting Type: Annual

Ticker: TXN

Shares Voted: 1,711

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark Blinn	Mgmt	For	For	For	For
1b	Elect Director Todd Bluedorn	Mgmt	For	For	For	For
1c	Elect Director Janet Clark	Mgmt	For	For	For	For
1d	Elect Director Carrie Cox	Mgmt	For	For	For	For

## Texas Instruments Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Martin Craighead	Mgmt	For	For	For	For
1f	Elect Director Reginald DesRoches	Mgmt	For	For	For	For
1g	Elect Director Curtis Farmer	Mgmt	For	For	For	For
1h	Elect Director Jean Hobby	Mgmt	For	For	For	For
1i	Elect Director Haviv Ilan	Mgmt	For	For	For	For
1j	Elect Director Ronald Kirk	Mgmt	For	For	For	For
1k	Elect Director Pamela Patsley	Mgmt	For	For	For	For
1l	Elect Director Robert Sanchez	Mgmt	For	For	For	For
1m	Elect Director Richard Templeton	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For	Against

## Bio-Rad Laboratories, Inc.

Meeting Date: 04/22/2025	Country: USA	Ticker: BIO
Record Date: 02/24/2025	Meeting Type: Annual	
Primary Security ID: 090572207		

Shares Voted: 1,606

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Melinda Litherland	Mgmt	For	For	For	For
1.2	Elect Director Arnold A. Pinkston	Mgmt	For	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For	For
3	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For	Against

## Johnson & Johnson

Meeting Date: 04/24/2025	Country: USA	Ticker: JNJ
Record Date: 02/25/2025	Meeting Type: Annual	
Primary Security ID: 478160104		

Johnson & Johnson

Shares Voted: 2,786

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For	For	For
1b	Elect Director Mary C. Beckerle	Mgmt	For	For	For	For
1c	Elect Director Jennifer A. Doudna	Mgmt	For	For	For	For
1d	Elect Director Joaquin Duato	Mgmt	For	For	For	For
1e	Elect Director Marillyn A. Hewson	Mgmt	For	For	For	For
1f	Elect Director Paula A. Johnson	Mgmt	For	For	For	For
1g	Elect Director Hubert Joly	Mgmt	For	For	For	For
1h	Elect Director Mark B. McClellan	Mgmt	For	For	For	For
1i	Elect Director Mark A. Weinberger	Mgmt	For	For	For	For
1j	Elect Director Nadja Y. West	Mgmt	For	For	For	For
1k	Elect Director Eugene A. Woods	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against	Against
5	Oversee and Report Human Rights Impact Assessment	SH	Against	Against	Against	Against

Abbott Laboratories

Meeting Date: 04/25/2025Country: USATicker: ABT

Record Date: 02/26/2025Meeting Type: Annual

Primary Security ID: 002824100

Shares Voted: 7,350

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

Abbott Laboratories

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

American Electric Power Company, Inc.

Meeting Date: 04/29/2025Country: USATicker: AEP

Record Date: 03/04/2025Meeting Type: Annual

Primary Security ID: 025537101

Shares Voted: 7,030

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bill Fehrman	Mgmt	For	For	For	For
1.2	Elect Director Ben Fowke	Mgmt	For	For	For	For
1.3	Elect Director Art A. Garcia	Mgmt	For	For	For	For
1.4	Elect Director Hunter C. Gary	Mgmt	For	For	For	For
1.5	Elect Director Sandra Beach Lin	Mgmt	For	For	For	For
1.6	Elect Director Henry P. Linginfelter	Mgmt	For	For	For	For
1.7	Elect Director Margaret M. McCarthy	Mgmt	For	For	For	For
1.8	Elect Director Daryl Roberts	Mgmt	For	For	For	For
1.9	Elect Director Joseph G. Sauvage	Mgmt	For	For	For	For
1.10	Elect Director Daniel G. Stoddard	Mgmt	For	For	For	For
1.11	Elect Director Sara Martinez Tucker	Mgmt	For	For	For	For
1.12	Elect Director Lewis Von Thae	Mgmt	For	For	For	For

American Electric Power Company, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

BorgWarner Inc.

Meeting Date: 04/30/2025Country: USATicker: BWA

Record Date: 03/03/2025Meeting Type: Annual

Primary Security ID: 099724106

Shares Voted: 6,274

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Joseph F. Fadool	Mgmt	For	For	For	For
1B	Elect Director Sara A. Greenstein	Mgmt	For	For	For	For
1C	Elect Director Michael S. Hanley	Mgmt	For	For	For	For
1D	Elect Director Shaun E. McAlmont	Mgmt	For	For	For	For
1E	Elect Director Deborah D. McWhinney	Mgmt	For	For	For	For
1F	Elect Director Alexis P. Michas	Mgmt	For	For	For	For
1G	Elect Director Sailaja K. Shankar	Mgmt	For	For	For	For
1H	Elect Director Hau N. Thai-Tang	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against	Against

BWX Technologies, Inc.

Meeting Date: 05/02/2025Country: USATicker: BWXT

Record Date: 03/06/2025Meeting Type: Annual

Primary Security ID: 05605H100

BWX Technologies, Inc.

Shares Voted: 4,391

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jan A. Bertsch	Mgmt	For	For	For	For
1b	Elect Director Gerhard F. Burbach	Mgmt	For	For	For	For
1c	Elect Director Rex D. Geveden	Mgmt	For	For	For	For
1d	Elect Director James M. Jaska	Mgmt	For	For	For	For
1e	Elect Director Kenneth J. Krieg	Mgmt	For	For	For	For
1f	Elect Director Leland D. Melvin	Mgmt	For	For	For	For
1g	Elect Director Barbara A. Niland	Mgmt	For	For	For	For
1h	Elect Director Nicole W. Piasecki	Mgmt	For	For	For	For
1i	Elect Director John M. Richardson	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For

Danaher Corporation

Meeting Date: 05/06/2025Country: USATicker: DHR  
Record Date: 03/07/2025Meeting Type: Annual  
Primary Security ID: 235851102

Shares Voted: 2,420

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rainer M. Blair	Mgmt	For	For	For	For
1b	Elect Director Feroz Dewan	Mgmt	For	For	For	For
1c	Elect Director Linda Filler	Mgmt	For	For	For	For
1d	Elect Director Charles W. Lamanna	Mgmt	For	For	For	For
1e	Elect Director Teri List	Mgmt	For	Against	Against	For
1f	Elect Director Jessica L. Mega	Mgmt	For	For	For	For
1g	Elect Director Mitchell P. Rales	Mgmt	For	For	For	For
1h	Elect Director Steven M. Rales	Mgmt	For	For	For	For

Danaher Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director A. Shane Sanders	Mgmt	For	Against	Against	For
1j	Elect Director John T. Schwieters	Mgmt	For	Against	Against	For
1k	Elect Director Alan G. Spoon	Mgmt	For	For	For	For
1l	Elect Director Raymond C. Stevens	Mgmt	For	Against	Against	For
1m	Elect Director Elias A. Zerhouni	Mgmt	For	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

The Hershey Company

Meeting Date: 05/06/2025

Record Date: 03/07/2025

Primary Security ID: 427866108

Country: USA

Meeting Type: Annual

Ticker: HSY

Shares Voted: 1,600

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michele G. Buck	Mgmt	For	For	For	For
1b	Elect Director Timothy W. Curoe	Mgmt	For	For	For	For
1c	Elect Director Mary Kay Haben	Mgmt	For	For	For	For
1d	Elect Director Huong Maria T. Kraus	Mgmt	For	Against	Against	Against
1e	Elect Director Deirdre A. Mahlan	Mgmt	For	For	For	For
1f	Elect Director Barry J. Nalebuff	Mgmt	For	For	For	For
1g	Elect Director Kevin M. Ozan	Mgmt	For	For	For	For
1h	Elect Director Juan R. Perez	Mgmt	For	Against	Against	Against
1i	Elect Director Marie Quintero-Johnson	Mgmt	For	For	For	For
1j	Elect Director Cordel Robbin-Coker	Mgmt	For	For	For	For
1k	Elect Director Harold Singleton, III	Mgmt	For	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	Against

## The Hershey Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Amend Certificate of Incorporation re: Stockholders' Right to Fill Vacancies	Mgmt	For	For	For	For

## AMETEK, Inc.

Meeting Date: 05/07/2025	Country: USA	Ticker: AME
Record Date: 03/10/2025	Meeting Type: Annual	
Primary Security ID: 031100100		

Shares Voted: 1,927

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Dean Seavers	Mgmt	For	For	For	For
1b	Elect Director David A. Zapico	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For

## AptarGroup, Inc.

Meeting Date: 05/07/2025	Country: USA	Ticker: ATR
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 038336103		

Shares Voted: 6,360

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Giovanna Kampouri Monnas	Mgmt	For	For	For	For
1b	Elect Director Isabel Marey-Semper	Mgmt	For	For	For	For
1c	Elect Director Stephan B. Tanda	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For



S&P Global Inc.

Meeting Date: 05/07/2025

Record Date: 03/17/2025

Primary Security ID: 78409V104

Country: USA

Meeting Type: Annual

Ticker: SPGI

Shares Voted: 900

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Marco Alvera	Mgmt	For	For	For	For
1.2	Elect Director Martina L. Cheung	Mgmt	For	For	For	For
1.3	Elect Director Jacques Esculier	Mgmt	For	For	For	For
1.4	Elect Director William D. Green	Mgmt	For	For	For	For
1.5	Elect Director Stephanie C. Hill	Mgmt	For	For	For	For
1.6	Elect Director Rebecca Jacoby	Mgmt	For	For	For	For
1.7	Elect Director Ian Paul Livingston	Mgmt	For	For	For	For
1.8	Elect Director Maria R. Morris	Mgmt	For	For	For	For
1.9	Elect Director Gregory Washington	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against	Against

CME Group Inc.

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 12572Q105

Country: USA

Meeting Type: Annual

Ticker: CME

Shares Voted: 4,987

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Terrence A. Duffy	Mgmt	For	For	For	Against
1b	Elect Director Kathryn Benesh	Mgmt	For	For	For	Against
1c	Elect Director Timothy S. Bitsberger	Mgmt	For	For	For	Against
1d	Elect Director Charles P. Carey	Mgmt	For	For	For	Against
1e	Elect Director Bryan T. Durkin	Mgmt	For	For	For	Against
1f	Elect Director Harold Ford, Jr.	Mgmt	For	For	For	Against

CME Group Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Martin J. Gepsman	Mgmt	For	For	For	Against
1h	Elect Director Daniel G. Kaye	Mgmt	For	For	For	Against
1i	Elect Director Phyllis M. Lockett	Mgmt	For	Against	Against	Against
1j	Elect Director Deborah J. Lucas	Mgmt	For	For	For	Against
1k	Elect Director Rahael Seifu	Mgmt	For	For	For	Against
1l	Elect Director William R. Shepard	Mgmt	For	For	For	Against
1m	Elect Director Howard J. Siegel	Mgmt	For	For	For	Against
1n	Elect Director Dennis A. Suskind	Mgmt	For	For	For	Against
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

AbbVie Inc.

Meeting Date: 05/09/2025

Record Date: 03/10/2025

Primary Security ID: 00287Y109

Country: USA

Meeting Type: Annual

Ticker: ABBV

Shares Voted: 1,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William H.L. Burnside	Mgmt	For	For	For	For
1b	Elect Director Thomas C. Freyman	Mgmt	For	For	For	For
1c	Elect Director Brett J. Hart	Mgmt	For	For	For	For
1d	Elect Director Edward J. Rapp	Mgmt	For	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For	For
5	Adopt Simple Majority Vote	SH	Against	For	For	For

AAON, Inc.

Meeting Date: 05/13/2025

Record Date: 03/14/2025

Primary Security ID: 000360206

Country: USA

Meeting Type: Annual

Ticker: AAON

Shares Voted: 3,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director A.H. ("Chip") McElroy, II	Mgmt	For	For	For	For
1b	Elect Director Bruce Ware	Mgmt	For	For	For	For
2	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

Arthur J. Gallagher & Co.

Meeting Date: 05/13/2025

Record Date: 03/17/2025

Primary Security ID: 363576109

Country: USA

Meeting Type: Annual

Ticker: AJG

Shares Voted: 4,427

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

# State Street Corporation

Meeting Date: 05/14/2025

Record Date: 03/14/2025

Primary Security ID: 857477103

Country: USA

Meeting Type: Annual

Ticker: STT

Shares Voted: 3,131

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marie A. Chandoha	Mgmt	For	For	For	For
1b	Elect Director DonnaLee A. DeMaio	Mgmt	For	For	For	For
1c	Elect Director Amelia C. Fawcett	Mgmt	For	For	For	For
1d	Elect Director William C. Freda	Mgmt	For	For	For	For
1e	Elect Director Patricia M. Halliday	Mgmt	For	For	For	For
1f	Elect Director Sara Mathew	Mgmt	For	For	For	For
1g	Elect Director William L. Meaney	Mgmt	For	For	For	For
1h	Elect Director Ronald P. O'Hanley	Mgmt	For	For	For	For
1i	Elect Director Sean P. O'Sullivan	Mgmt	For	For	For	For
1j	Elect Director Julio A. Portalatin	Mgmt	For	For	For	For
1k	Elect Director John B. Rhea	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against	For
5	Report on "Just Transition"	SH	Against	Against	Against	Against

# Amphenol Corporation

Meeting Date: 05/15/2025

Record Date: 03/17/2025

Primary Security ID: 032095101

Country: USA

Meeting Type: Annual

Ticker: APH

Shares Voted: 25,380

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nancy A. Altobello	Mgmt	For	For	For	For
1.2	Elect Director David P. Falck	Mgmt	For	For	For	For

## Amphenol Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Rita S. Lane	Mgmt	For	For	For	For
1.4	Elect Director Robert A. Livingston	Mgmt	For	For	For	For
1.5	Elect Director Martin H. Loeffler	Mgmt	For	For	For	For
1.6	Elect Director R. Adam Norwitt	Mgmt	For	For	For	For
1.7	Elect Director Prahlad Singh	Mgmt	For	For	For	For
1.8	Elect Director Anne Clarke Wolff	Mgmt	For	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
4	Increase Authorized Common Stock	Mgmt	For	For	For	For
5	Amend Right to Call Special Meeting	SH	Against	Against	Against	Against

## CVS Health Corporation

Meeting Date: 05/15/2025	Country: USA	Ticker: CVS
Record Date: 03/17/2025	Meeting Type: Annual	
Primary Security ID: 126650100		

Shares Voted: 5,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Fernando Aguirre	Mgmt	For	For	For	For
1b	Elect Director Jeffrey R. Balser	Mgmt	For	For	For	For
1c	Elect Director C. David Brown, II	Mgmt	For	For	For	For
1d	Elect Director Alecia A. DeCoudreaux	Mgmt	For	For	For	For
1e	Elect Director Roger N. Farah	Mgmt	For	For	For	For
1f	Elect Director Anne M. Finucane	Mgmt	For	For	For	For
1g	Elect Director J. David Joyner	Mgmt	For	For	For	For
1h	Elect Director J. Scott Kirby	Mgmt	For	For	For	For
1i	Elect Director Michael F. Mahoney	Mgmt	For	For	For	For
1j	Elect Director Leslie V. Norwalk	Mgmt	For	For	For	For
1k	Elect Director Larry M. Robbins	Mgmt	For	For	For	For

CVS Health Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Guy P. Sansone	Mgmt	For	For	For	For
1m	Elect Director Douglas H. Shulman	Mgmt	For	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	Against
4	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Against	For	For	Against

Marsh & McLennan Companies, Inc.

Meeting Date: 05/15/2025

Country: USA

Ticker: MMC

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 571748102

Shares Voted: 6,480

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony K. Anderson	Mgmt	For	For	For	For
1b	Elect Director John Q. Doyle	Mgmt	For	For	For	For
1c	Elect Director H. Edward Hanway	Mgmt	For	For	For	For
1d	Elect Director Judith Hartmann	Mgmt	For	For	For	For
1e	Elect Director Deborah C. Hopkins	Mgmt	For	For	For	For
1f	Elect Director Tamara Ingram	Mgmt	For	For	For	For
1g	Elect Director Jane H. Lute	Mgmt	For	For	For	For
1h	Elect Director Steven A. Mills	Mgmt	For	For	For	Against
1i	Elect Director Morton O. Schapiro	Mgmt	For	For	For	For
1j	Elect Director Jan Siegmund	Mgmt	For	For	For	For
1k	Elect Director Lloyd M. Yates	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For	For

Martin Marietta Materials, Inc.

Meeting Date: 05/15/2025

Record Date: 03/07/2025

Primary Security ID: 573284106

Country: USA

Meeting Type: Annual

Ticker: MLM

Shares Voted: 1,675

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

Intercontinental Exchange, Inc.

Meeting Date: 05/16/2025

Record Date: 03/20/2025

Primary Security ID: 45866F104

Country: USA

Meeting Type: Annual

Ticker: ICE

Shares Voted: 5,850

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sharon Y. Bowen	Mgmt	For	For	For	For
1b	Elect Director Shantella E. Cooper	Mgmt	For	For	For	For
1c	Elect Director Duriya M. Farooqui	Mgmt	For	For	For	For
1d	Elect Director The Right Hon. the Lord Hague of Richmond	Mgmt	For	For	For	For
1e	Elect Director Mark F. Mulhern	Mgmt	For	For	For	For

Intercontinental Exchange, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Thomas E. Noonan	Mgmt	For	For	For	For
1g	Elect Director Caroline L. Silver	Mgmt	For	For	For	For
1h	Elect Director Jeffrey C. Sprecher	Mgmt	For	For	For	For
1i	Elect Director Judith A. Sprieser	Mgmt	For	For	For	For
1j	Elect Director Martha A. Tirinnanzi	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Amend Certificate of Incorporation to Extend Voting Limitations	Mgmt	For	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For

JPMorgan Chase & Co.

Meeting Date: 05/20/2025Country: USATicker: JPM

Record Date: 03/21/2025Meeting Type: Annual

Primary Security ID: 46625H100

Shares Voted: 2,490

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	For	For	For	For
1b	Elect Director Michele G. Buck	Mgmt	For	For	For	For
1c	Elect Director Stephen B. Burke	Mgmt	For	For	For	For
1d	Elect Director Todd A. Combs	Mgmt	For	For	For	For
1e	Elect Director Alicia Boler Davis	Mgmt	For	For	For	For
1f	Elect Director James Dimon	Mgmt	For	For	For	For
1g	Elect Director Alex Gorsky	Mgmt	For	For	For	For
1h	Elect Director Mellody Hobson	Mgmt	For	For	For	For
1i	Elect Director Phebe N. Novakovic	Mgmt	For	For	For	For
1j	Elect Director Virginia M. Rometty	Mgmt	For	For	For	For
1k	Elect Director Brad D. Smith	Mgmt	For	For	For	For
1l	Elect Director Mark A. Weinberger	Mgmt	For	For	For	For



JPMorgan Chase & Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
4	Require Independent Board Chair	SH	Against	For	For	Against
5	Report on Social Impacts of Climate Transition Finance	SH	Against	Against	Against	Against

Tradeweb Markets Inc.

Meeting Date: 05/20/2025Country: USATicker: TW

Record Date: 03/24/2025Meeting Type: Annual

Primary Security ID: 892672106

Shares Voted: 2,430						
Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Steven Berns	Mgmt	For	For	For	For
1.2	Elect Director William (Billy) Hult	Mgmt	For	For	For	For
1.3	Elect Director Lisa Opoku	Mgmt	For	Withhold	Withhold	For
1.4	Elect Director Rana Yared	Mgmt	For	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

Verisk Analytics, Inc.

Meeting Date: 05/20/2025Country: USATicker: VRSK

Record Date: 03/24/2025Meeting Type: Annual

Primary Security ID: 92345Y106

Shares Voted: 2,210						
Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey Dailey	Mgmt	For	For	For	For
1b	Elect Director Bruce Hansen	Mgmt	For	For	For	For
1c	Elect Director Gregory Hendrick	Mgmt	For	For	For	For
1d	Elect Director Kathleen A. Hogenson	Mgmt	For	For	For	For

Verisk Analytics, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Samuel G. Liss	Mgmt	For	For	For	For
1f	Elect Director Christopher J. Perry	Mgmt	For	For	For	For
1g	Elect Director Sabra R. Purtill	Mgmt	For	For	For	For
1h	Elect Director Lee M. Shavel	Mgmt	For	For	For	For
1i	Elect Director Olumide Soroye	Mgmt	For	For	For	For
1j	Elect Director Kimberly S. Stevenson	Mgmt	For	For	For	For
1k	Elect Director Therese M. Vaughan	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
4	Eliminate Supermajority Vote Requirement for Limitation on Beneficial Ownership of the Company	Mgmt	For	For	For	For
5	Eliminate Supermajority Vote Requirement for Certain Business Combinations	Mgmt	For	For	For	For
6	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For	For
7	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	For	For	For
8	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For	Against

Amazon.com, Inc.

Meeting Date: 05/21/2025

Country: USA

Ticker: AMZN

Record Date: 03/27/2025

Meeting Type: Annual

Primary Security ID: 023135106

Shares Voted: 5,802

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey P. Bezos	Mgmt	For	For	For	For
1b	Elect Director Andrew R. Jassy	Mgmt	For	For	For	For
1c	Elect Director Keith B. Alexander	Mgmt	For	For	For	For
1d	Elect Director Edith W. Cooper	Mgmt	For	For	For	For

Amazon.com, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Jamie S. Gorelick	Mgmt	For	For	For	For
1f	Elect Director Daniel P. Huttenlocher	Mgmt	For	For	For	For
1g	Elect Director Andrew Y. Ng	Mgmt	For	For	For	For
1h	Elect Director Indra K. Nooyi	Mgmt	For	For	For	For
1i	Elect Director Jonathan J. Rubinstein	Mgmt	For	For	For	For
1j	Elect Director Brad D. Smith	Mgmt	For	For	For	For
1k	Elect Director Patricia Q. Stonesifer	Mgmt	For	For	For	For
1l	Elect Director Wendell P. Weeks	Mgmt	For	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	For
4	Adopt Mandatory Policy Separating the Roles of CEO and Board Chair	SH	Against	Against	Against	Against
5	Report on Risks of Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against	Against
6	Disclose All Material Scope 3 Emissions	SH	Against	Against	Against	Against
7	Report on Impact of Data Centers on Climate Commitments	SH	Against	Against	Against	Against
8	Commission Third Party Assessment of Board Oversight of Human Rights Risks of AI	SH	Against	Against	Against	Against
9	Report on Efforts to Reduce Plastic Packaging	SH	Against	Against	Against	Against
10	Commission Independent Audit and Report on Warehouse Working Conditions	SH	Against	Against	Against	Against
11	Report on Unethical Use of External Data in Development of AI Products	SH	Against	Against	Against	Against

ITT Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: ITT
Record Date: 03/25/2025	Meeting Type: Annual	
Primary Security ID: 45073V108		

Shares Voted: 2,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kevin Berryman	Mgmt	For	For	For	For
1b	Elect Director Maggie Chu	Mgmt	For	For	For	For
1c	Elect Director Donald DeFosset, Jr.	Mgmt	For	For	For	For
1d	Elect Director Douglas G. DelGrosso	Mgmt	For	For	For	For
1e	Elect Director Nazzic S. Keene	Mgmt	For	For	For	For
1f	Elect Director Rebecca A. McDonald	Mgmt	For	For	For	For
1g	Elect Director Christopher O'Shea	Mgmt	For	For	For	For
1h	Elect Director Timothy H. Powers	Mgmt	For	For	For	For
1i	Elect Director Luca Savi	Mgmt	For	For	For	For
1j	Elect Director Sharon Szafranski	Mgmt	For	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

The Southern Company

Meeting Date: 05/21/2025

Record Date: 03/31/2025

Primary Security ID: 842587107

Country: USA

Meeting Type: Annual

Ticker: SO

Shares Voted: 5,333

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Janaki Akella	Mgmt	For	For	For	For
1b	Elect Director Shantella E. Cooper	Mgmt	For	For	For	For
1c	Elect Director Anthony F. "Tony" Earley, Jr.	Mgmt	For	For	For	For
1d	Elect Director James O. "Jimmy" Etheredge	Mgmt	For	For	For	For
1e	Elect Director David J. Grain	Mgmt	For	For	For	For
1f	Elect Director Donald M. James	Mgmt	For	For	For	For
1g	Elect Director John D. Johns	Mgmt	For	For	For	For

## The Southern Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Dale E. Klein	Mgmt	For	For	For	For
1i	Elect Director David E. Meador	Mgmt	For	For	For	For
1j	Elect Director William G. Smith, Jr.	Mgmt	For	For	For	For
1k	Elect Director Kristine L. Svinicki	Mgmt	For	For	For	For
1l	Elect Director Lizanne Thomas	Mgmt	For	For	For	For
1m	Elect Director Christopher C. Womack	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For
4	Reduce Supermajority Vote Requirement	Mgmt	For	For	For	For
5	Adopt Simple Majority Vote	SH	Against	For	For	For
6	Disclose Assumptions Underlying Increased Reliance on Fossil Fuel-Based Energy Production	SH	Against	Against	Against	Against
7	Report on Net Zero Activities	SH	Against	Against	Against	Against
8	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against	Against	Against

## Verizon Communications Inc.

Meeting Date: 05/22/2025	Country: USA	Ticker: VZ
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 92343V104		

Shares Voted: 26,780

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Shellye Archambeau	Mgmt	For	For	For	For
1.2	Elect Director Roxanne Austin	Mgmt	For	For	For	For
1.3	Elect Director Mark Bertolini	Mgmt	For	For	For	For
1.4	Elect Director Vittorio Colao	Mgmt	For	For	For	For
1.5	Elect Director Caroline Litchfield	Mgmt	For	For	For	For
1.6	Elect Director Laxman Narasimhan	Mgmt	For	For	For	For
1.7	Elect Director Clarence Otis, Jr.	Mgmt	For	For	For	For

Verizon Communications Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Daniel Schulman	Mgmt	For	For	For	For
1.9	Elect Director Carol Tome	Mgmt	For	For	For	For
1.10	Elect Director Hans Vestberg	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
4	Report on Climate Lobbying	SH	Against	Against	Against	Against
5	Report on Potential Hazards of Lead Cables and Potential Remediation Costs	SH	Against	Against	Against	Against
6	Report on Risks Related to Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against	Against

Waters Corporation

Meeting Date: 05/22/2025Country: USATicker: WAT

Record Date: 03/24/2025Meeting Type: Annual

Primary Security ID: 941848103

Shares Voted: 2,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Flemming Ornskov	Mgmt	For	For	For	For
1.2	Elect Director Linda Baddour	Mgmt	For	For	For	For
1.3	Elect Director Udit Batra	Mgmt	For	For	For	For
1.4	Elect Director Dan Brennan	Mgmt	For	For	For	For
1.5	Elect Director Richard Fearon	Mgmt	For	For	For	For
1.6	Elect Director Pearl S. Huang	Mgmt	For	For	For	For
1.7	Elect Director Wei Jiang	Mgmt	For	For	For	For
1.8	Elect Director Heather Knight	Mgmt	For	For	For	For
1.9	Elect Director Christopher A. Kuebler	Mgmt	For	For	For	For
1.10	Elect Director Mark Vergnano	Mgmt	For	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

Waters Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For	For

Ryan Specialty Holdings, Inc.

Meeting Date: 05/30/2025	Country: USA	Ticker: RYAN
Record Date: 04/01/2025	Meeting Type: Annual	
Primary Security ID: 78351F107		

Shares Voted: 2,876						
Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Henry S. Bienen	Mgmt	For	For	For	For
1.2	Elect Director Michael D. O'Halleran	Mgmt	For	Withhold	Withhold	Withhold
1.3	Elect Director Timothy W. Turner	Mgmt	For	For	For	For
1.4	Elect Director Patrick G. Ryan, Jr.	Mgmt	For	For	For	Withhold
2	Declassify the Board of Directors	Mgmt	For	For	For	For
3	Adopt Majority Voting for Uncontested Election of Directors	Mgmt	For	For	For	For
4	Eliminate Supermajority Vote Requirement to Remove Directors	Mgmt	For	For	For	For
5	Amend Certificate of Incorporation to Provide a Specific Outside Date to Sunset the High Vote of the Class B Common Stock	Mgmt	For	For	For	For
6	Provide Right to Act by Written Consent	Mgmt	For	For	For	For
7	Provide Right to Call Special Meeting	Mgmt	For	For	For	For
8	Eliminate Supermajority Vote Requirements to Amend Bylaws and Certain Provisions of the Certificate	Mgmt	For	For	For	For
9	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	Against	Against	Against
10	Amend Certificate of Incorporation to Incorporate Certain Non-Substantive Amendments	Mgmt	For	For	For	For
11	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	For

Ryan Specialty Holdings, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
12	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For

UnitedHealth Group Incorporated

**Meeting Date:** 06/02/2025

**Country:** USA

**Ticker:** UNH

**Record Date:** 04/04/2025

**Meeting Type:** Annual

**Primary Security ID:** 91324P102

Shares Voted: 2,086

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	For	For	For	For
1b	Elect Director Timothy Flynn	Mgmt	For	For	For	For
1c	Elect Director Paul Garcia	Mgmt	For	For	For	For
1d	Elect Director Kristen Gil	Mgmt	For	For	For	For
1e	Elect Director Stephen Hemsley	Mgmt	For	For	For	For
1f	Elect Director Michele Hooper	Mgmt	For	For	For	For
1g	Elect Director F. William McNabb, III	Mgmt	For	For	For	For
1h	Elect Director Valerie Montgomery Rice	Mgmt	For	For	For	For
1i	Elect Director John Noseworthy	Mgmt	For	For	For	For
1j	Elect Director Andrew Witty *Withdrawn Resolution*	Mgmt				
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For	Against
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against	Against

FTI Consulting, Inc.

**Meeting Date:** 06/04/2025

**Country:** USA

**Ticker:** FCN

**Record Date:** 03/06/2025

**Meeting Type:** Annual

**Primary Security ID:** 302941109



Shares Voted: 4,964

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark S. Bartlett	Mgmt	For	For	For	For
1b	Elect Director Elsy Boglioli	Mgmt	For	For	For	For
1c	Elect Director Claudio Costamagna	Mgmt	For	For	For	For
1d	Elect Director Nicholas C. Fanandakis	Mgmt	For	For	For	For
1e	Elect Director Steven H. Gunby	Mgmt	For	For	For	For
1f	Elect Director Stephen C. Robinson	Mgmt	For	For	For	For
1g	Elect Director Laureen E. Seeger	Mgmt	For	For	For	For
1h	Elect Director Eric T. Steigerwalt	Mgmt	For	For	For	For
1i	Elect Director Janet H. Zelenka	Mgmt	For	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For	For

Mastercard Incorporated

Meeting Date: 06/24/2025Country: USATicker: MA

Record Date: 04/25/2025Meeting Type: Annual

Primary Security ID: 57636Q104

Shares Voted: 1,755

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

Mastercard Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Rima Qureshi	Mgmt	For	For	For	For
1j	Elect Director Gabrielle Sulzberger	Mgmt	For	For	For	For
1k	Elect Director Harit Talwar	Mgmt	For	For	For	For
1l	Elect Director Lance Uggla	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Officers	Mgmt	For	For	For	For
5	Amend Articles of Incorporation to Remove Industry Director Concept	Mgmt	For	For	For	For
6	Amend Certificate of Incorporation	Mgmt	For	For	For	For
7	Oversee and Report on a Racial Equity Audit	SH	Against	Against	Against	Against
8	Report on Discrimination Risks of Affirmative Action Initiatives	SH	Against	Against	Against	Against

Aon Plc

Meeting Date: 06/27/2025

Record Date: 04/11/2025

Primary Security ID: G0403H108

Country: Ireland

Meeting Type: Annual

Ticker: AON

Shares Voted: 500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Lester B. Knight	Mgmt	For	For	For	For
1.2	Elect Director Gregory C. Case	Mgmt	For	For	For	For
1.3	Elect Director Jose Antonio Alvarez	Mgmt	For	For	For	For
1.4	Elect Director Jin-Yong Cai	Mgmt	For	For	For	For
1.5	Elect Director Jeffrey C. Campbell	Mgmt	For	For	For	For
1.6	Elect Director Cheryl A. Francis	Mgmt	For	For	For	For
1.7	Elect Director Adriana Karaboutis	Mgmt	For	For	For	For
1.8	Elect Director Richard C. Notebaert	Mgmt	For	For	For	For
1.9	Elect Director Gloria Santona	Mgmt	For	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	ISS Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Sarah E. Smith	Mgmt	For	For	For	For
1.11	Elect Director Byron O. Spruell	Mgmt	For	For	For	For
1.12	Elect Director James G. Stavridis	Mgmt	For	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For	For
4	Ratify Ernst & Young Chartered Accountants as Statutory Auditor	Mgmt	For	For	For	For
5	Authorize the Audit Committee to Fix Remuneration of Auditors	Mgmt	For	For	For	For
6	Authorise Issue of Equity	Mgmt	For	For	For	For
7	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For	For
8	Amend Omnibus Stock Plan	Mgmt	For	For	For	For