

At Matarin, when we are focusing on long-term ideas about sustainability and responsibility we are focused not only on our clients' portfolios, but also on our *own company's* impact in the world. Around the office, we like to call this the "Fifth Pillar of Responsible Investment at Matarin."

Our firm was founded with a goal of helping to raise the bar for ethics, integrity, and inclusion in the investment industry. Matarin's principals have all made the major career choice of moving from large, successful asset management businesses, into Matarin's niche, boutique firm structure so that we could focus more exclusively on being true stewards of our clients' assets – always putting our best interests before our own, when it comes to our daily practices.

This has led to several important decisions at Matarin, such as always charging what we believe to be fair fees, never using soft dollars when we trade, and offering transparent and effective communications to our investors. We hope that as Matarin rises in public awareness, we may be able to use the platform to share ideas about these values and practices throughout our industry.

Matarin's focus on corporate responsibility also means supporting our teammates in taking time to volunteer with important causes. Please take a look at the link below to learn about some of the causes that our team cares about, and have supported over the years.¹ Matarin is also committing a portion the company's financial resources to philanthropy every year.

As a majority women-owned investment firm, Matarin is also contributing both directly and indirectly to greater diversity in our industry. We believe that finance can be viewed as a conversation among investors about what things should be worth in our world, and that who is at the table taking part in those conversations really matters. We envision a future for investment management that is full of people who have had different kinds of life experiences, that includes many people with different genders, races and ethnicities, and people who have been raised in different places with different kinds of backgrounds. If we can create a more inclusive conversation about value, then the market conversation will be deeper, richer, and will take more perspectives into account by definition.

As our own firm achieves this, we believe that our investments and company management benefit from a rich cognitive diversity, which helps us to see questions from many different sides. If our industry as a whole can achieve this, our personal belief is that more a well-rounded consideration of Sustainability and Corporate Responsibility both within its member firms, as well as within its investment portfolios will also follow.

¹ Please click [here](#) to learn more about Team Matarin's Community Involvement.

Disclaimer

The information in this document is confidential and is being provided at your request. Nothing herein is intended to constitute an offer or the solicitation of an offer. In particular, please note that we have referred to Matarin's "Long-Term Investment Index" to describe an idea under development; it is not currently an existing product or strategy, and is subject to change prior to any launch. Further, the timing and certainty of launch remains to be determined, for reasons including the involvement of and reliance on the third parties mentioned above.