

VOTE SUMMARY REPORT

REPORTING PERIOD: 07/01/2024 to 06/30/2025

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): ALL INSTITUTION ACCOUNTS

Snowflake Inc.

Meeting Date: 07/02/2024Country: USATicker: SNOW

Record Date: 05/07/2024Meeting Type: Annual

Primary Security ID: 833445109

Shares Voted: 2,742

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Benoit Dageville	Mgmt	For	Withhold	Withhold
1b	Elect Director Mark S. Garrett	Mgmt	For	Withhold	Withhold
1c	Elect Director Jayshree V. Ullal	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Declassify the Board of Directors	SH	Against	For	For

Autodesk, Inc.

Meeting Date: 07/16/2024Country: USATicker: ADSK

Record Date: 05/29/2024Meeting Type: Annual

Primary Security ID: 052769106

Shares Voted: 1,103

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Andrew Anagnost	Mgmt	For	For	For
1b	Elect Director Karen Blasing	Mgmt	For	For	For
1c	Elect Director Reid French	Mgmt	For	For	For
1d	Elect Director Ayanna Howard	Mgmt	For	For	For
1e	Elect Director Blake Irving	Mgmt	For	For	For
1f	Elect Director Mary T. McDowell	Mgmt	For	For	For
1g	Elect Director Stephen Milligan	Mgmt	For	For	For
1h	Elect Director Lorrie M. Norrington	Mgmt	For	For	For
1i	Elect Director Betsy Rafael	Mgmt	For	For	For
1j	Elect Director Rami Rahim	Mgmt	For	For	For

Autodesk, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Stacy J. Smith	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	For	For
5	Provide Right to Call a Special Meeting	SH	Against	For	For

Constellation Brands, Inc.

Meeting Date: 07/17/2024Country: USATicker: STZ

Record Date: 05/20/2024Meeting Type: Annual

Primary Security ID: 21036P108

Shares Voted: 1,169

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Christopher J. Baldwin	Mgmt	For	For	For
1b	Elect Director Christy Clark	Mgmt	For	For	For
1c	Elect Director Jennifer M. Daniels	Mgmt	For	For	For
1d	Elect Director Nicholas I. Fink	Mgmt	For	For	For
1e	Elect Director William Giles	Mgmt	For	For	For
1f	Elect Director Ernesto M. Hernandez	Mgmt	For	For	For
1g	Elect Director Jose Manuel Madero Garza	Mgmt	For	For	For
1h	Elect Director Daniel J. McCarthy	Mgmt	For	For	For
1i	Elect Director William A. Newlands	Mgmt	For	For	For
1j	Elect Director Richard Sands	Mgmt	For	For	For
1k	Elect Director Robert Sands	Mgmt	For	For	For
1l	Elect Director Judy A. Schmeling	Mgmt	For	For	For
1m	Elect Director Luca Zaramella	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Constellation Brands, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Supply Chain Water Risk Exposure	SH	Against	For	For
5	Report on Efforts to Reduce GHG Emissions in Alignment with Paris Agreement Goals	SH	Against	For	For
6	Report on Support for a Circular Economy for Packaging	SH	Against	For	For

EQT Corporation

Meeting Date: 07/18/2024Country: USATicker: EQT

Record Date: 05/16/2024Meeting Type: Special

Primary Security ID: 26884L109

Shares Voted: 605

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Issue Shares in Connection with Merger	Mgmt	For	For	For
2	Increase Authorized Common Stock	Mgmt	For	For	For
3	Adjourn Meeting	Mgmt	For	For	For

Booz Allen Hamilton Holding Corporation

Meeting Date: 07/24/2024Country: USATicker: BAH

Record Date: 06/03/2024Meeting Type: Annual

Primary Security ID: 099502106

Shares Voted: 744

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Horacio D. Rozanski	Mgmt	For	For	For
1b	Elect Director Joan Lordi C. Amble	Mgmt	For	For	For
1c	Elect Director Melody C. Barnes	Mgmt	For	For	For
1d	Elect Director Michele A. Flournoy	Mgmt	For	For	For
1e	Elect Director Mark E. Gaumond	Mgmt	For	For	For
1f	Elect Director Ellen Jewett	Mgmt	For	For	For
1g	Elect Director Arthur E. Johnson	Mgmt	For	For	For

Booz Allen Hamilton Holding Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Gretchen W. McClain	Mgmt	For	For	For
1i	Elect Director Rory P. Read	Mgmt	For	For	For
1j	Elect Director Charles O. Rossotti	Mgmt	For	For	For
1k	Elect Director William M. Thornberry	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Linde Plc

Meeting Date: 07/30/2024Country: IrelandTicker: LIN

Record Date: 04/26/2024Meeting Type: Annual

Primary Security ID: G54950103

Shares Voted: 4,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stephen F. Angel	Mgmt	For	For	For
1b	Elect Director Sanjiv Lamba	Mgmt	For	For	For
1c	Elect Director Ann-Kristin Achleitner	Mgmt	For	For	For
1d	Elect Director Thomas Enders	Mgmt	For	For	For
1e	Elect Director Hugh Grant	Mgmt	For	For	For
1f	Elect Director Joe Kaeser	Mgmt	For	For	For
1g	Elect Director Victoria E. Ossadnik	Mgmt	For	For	For
1h	Elect Director Paula Rosput Reynolds	Mgmt	For	For	For
1i	Elect Director Alberto Weisser	Mgmt	For	For	For
1j	Elect Director Robert L. Wood	Mgmt	For	For	For
2a	Ratify PricewaterhouseCoopers as Auditors	Mgmt	For	For	For
2b	Authorise Board to Fix Remuneration of Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For

McKesson Corporation

Meeting Date: 07/31/2024Country: USATicker: MCK

Record Date: 06/05/2024Meeting Type: Annual

Primary Security ID: 58155Q103

Shares Voted: 748

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard H. Carmona	Mgmt	For	For	For
1b	Elect Director Dominic J. Caruso	Mgmt	For	For	For
1c	Elect Director W. Roy Dunbar	Mgmt	For	For	For
1d	Elect Director Deborah Dunsire	Mgmt	For	For	For
1e	Elect Director James H. Hinton	Mgmt	For	For	For
1f	Elect Director Donald R. Knauss	Mgmt	For	For	For
1g	Elect Director Bradley E. Lerman	Mgmt	For	For	For
1h	Elect Director Maria N. Martinez	Mgmt	For	For	For
1i	Elect Director Kevin M. Ozan	Mgmt	For	For	For
1j	Elect Director Brian S. Tyler	Mgmt	For	For	For
1k	Elect Director Kathleen Wilson-Thompson	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
5	Require Independent Board Chair	SH	Against	Against	Against
6	Report on Potential Risks and Costs of Restrictive Reproductive Healthcare Legislation	SH	Against	Against	Against

Electronic Arts Inc.

Meeting Date: 08/01/2024Country: USATicker: EA

Record Date: 06/06/2024Meeting Type: Annual

Primary Security ID: 285512109

Electronic Arts Inc.

Shares Voted: 1,565

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kofi A. Bruce	Mgmt	For	For	For
1b	Elect Director Rachel A. Gonzalez	Mgmt	For	For	For
1c	Elect Director Jeffrey T. Huber	Mgmt	For	For	For
1d	Elect Director Talbott Roche	Mgmt	For	For	For
1e	Elect Director Richard A. Simonson	Mgmt	For	For	For
1f	Elect Director Luis A. Ubinas	Mgmt	For	For	For
1g	Elect Director Heidi J. Ueberroth	Mgmt	For	For	For
1h	Elect Director Andrew Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

STERIS plc

Meeting Date: 08/01/2024Country: IrelandTicker: STE

Record Date: 06/03/2024Meeting Type: Annual

Primary Security ID: G8473T100

Shares Voted: 580

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Esther M. Alegria	Mgmt	For	For	For
1b	Elect Director Richard C. Breeden	Mgmt	For	For	For
1c	Elect Director Daniel A. Carestio	Mgmt	For	For	For
1d	Elect Director Cynthia L. Feldmann	Mgmt	For	For	For
1e	Elect Director Christopher S. Holland	Mgmt	For	For	For
1f	Elect Director Jacqueline B. Kosecoff	Mgmt	For	For	For
1g	Elect Director Paul E. Martin	Mgmt	For	For	For
1h	Elect Director Nirav R. Shah	Mgmt	For	For	For
1i	Elect Director Mohsen M. Sohi	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Richard M. Steeves	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Appoint Ernst & Young Chartered Accountants as Irish Statutory Auditor	Mgmt	For	For	For
4	Authorise Board to Fix Remuneration of Auditors	Mgmt	For	For	For
5	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
6	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For	For
7	Renew the Board's Authority to Opt-Out of Statutory Pre-emption Rights Under Irish Law	Mgmt	For	For	For

The J. M. Smucker Company

Meeting Date: 08/14/2024Country: USATicker: SJM

Record Date: 06/17/2024Meeting Type: Annual

Primary Security ID: 832696405

Shares Voted: 611

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mercedes Abramo	Mgmt	For	For	For
1b	Elect Director Tarang Amin	Mgmt	For	For	For
1c	Elect Director Susan Chapman-Hughes	Mgmt	For	For	For
1d	Elect Director Jay Henderson	Mgmt	For	For	For
1e	Elect Director Jonathan Johnson, III	Mgmt	For	For	For
1f	Elect Director Kirk Perry	Mgmt	For	For	For
1g	Elect Director Alex Shumate	Mgmt	For	For	For
1h	Elect Director Mark Smucker	Mgmt	For	For	For
1i	Elect Director Jodi Taylor	Mgmt	For	For	For
1j	Elect Director Dawn Willoughby	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## The J. M. Smucker Company

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

## Microchip Technology Incorporated

Meeting Date: 08/20/2024Country: USATicker: MCHP

Record Date: 06/21/2024Meeting Type: Annual

Primary Security ID: 595017104

Shares Voted: 2,947

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ellen L. Barker	Mgmt	For	For	For
1b	Elect Director Matthew W. Chapman	Mgmt	For	For	For
1c	Elect Director Karlton D. Johnson	Mgmt	For	For	For
1d	Elect Director Ganesh Moorthy	Mgmt	For	For	For
1e	Elect Director Robert A. Rango	Mgmt	For	For	For
1f	Elect Director Karen M. Rapp	Mgmt	For	For	For
1g	Elect Director Steve Sanghi	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Report on Due Diligence Efforts to Trace End-User Misuse of Company Products	SH	Against	Against	Against

## Marathon Oil Corporation

Meeting Date: 08/29/2024Country: USATicker: MRO

Record Date: 07/26/2024Meeting Type: Special

Primary Security ID: 565849106

Shares Voted: 2,286

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	For	For	For
2	Advisory Vote on Golden Parachutes	Mgmt	For	Against	Against



## Marathon Oil Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Adjourn Meeting	Mgmt	For	For	For

## Deckers Outdoor Corporation

Meeting Date: 09/09/2024	Country: USA	Ticker: DECK
Record Date: 07/11/2024	Meeting Type: Annual	
Primary Security ID: 243537107		

Shares Voted: 82					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael F. Devine, III	Mgmt	For	For	For
1b	Elect Director David A. Burwick	Mgmt	For	For	For
1c	Elect Director Stefano Caroti	Mgmt	For	For	For
1d	Elect Director Nelson C. Chan	Mgmt	For	For	For
1e	Elect Director Cynthia (Cindy) L. Davis	Mgmt	For	For	For
1f	Elect Director Juan R. Figuereo	Mgmt	For	For	For
1g	Elect Director Maha S. Ibrahim	Mgmt	For	For	For
1h	Elect Director Victor Luis	Mgmt	For	For	For
1i	Elect Director Dave Powers	Mgmt	For	For	For
1j	Elect Director Lauri M. Shanahan	Mgmt	For	For	For
1k	Elect Director Bonita C. Stewart	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Approve Omnibus Stock Plan	Mgmt	For	For	For
6	Approve Stock Split	Mgmt	For	For	For

## Gen Digital Inc.

Meeting Date: 09/10/2024	Country: USA	Ticker: GEN
Record Date: 07/15/2024	Meeting Type: Annual	
Primary Security ID: 668771108		

Gen Digital Inc.

Shares Voted: 2,228

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan P. Barsamian	Mgmt	For	For	For
1b	Elect Director Pavel Baudis	Mgmt	For	For	For
1c	Elect Director Eric K. Brandt	Mgmt	For	For	For
1d	Elect Director Frank E. Dangeard	Mgmt	For	For	For
1e	Elect Director Nora M. Denzel	Mgmt	For	For	For
1f	Elect Director Peter A. Feld	Mgmt	For	For	For
1g	Elect Director Emily Heath	Mgmt	For	For	For
1h	Elect Director Vincent Pilette	Mgmt	For	For	For
1i	Elect Director Sherrese M. Smith	Mgmt	For	For	For
1j	Elect Director Ondrej Vlcek	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

NIKE, Inc.

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

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

Primary Security ID: 654106103

Shares Voted: 4,153

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

NIKE, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Report on Effectiveness of Supply Chain Management on Equity Goals and Human Rights Commitments	SH	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
7	Report on Environmental Targets	SH	Against	For	For
8	Report on Congruency of Voluntary Partnerships with Company's Fiduciary Duties	SH	Against	Against	Against

NetApp, Inc.

Meeting Date: 09/11/2024

Record Date: 07/16/2024

Primary Security ID: 64110D104

Country: USA

Meeting Type: Annual

Ticker: NTAP

Shares Voted: 702

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director T. Michael Nevens	Mgmt	For	For	For
1b	Elect Director Deepak Ahuja	Mgmt	For	For	For
1c	Elect Director Anders Gustafsson	Mgmt	For	For	For
1d	Elect Director Gerald Held	Mgmt	For	For	For
1e	Elect Director Deborah L. Kerr	Mgmt	For	For	For
1f	Elect Director George Kurian	Mgmt	For	For	For
1g	Elect Director Carrie Palin	Mgmt	For	For	For
1h	Elect Director Scott F. Schenkel	Mgmt	For	For	For
1i	Elect Director June Yang	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against

Conagra Brands, Inc.

Meeting Date: 09/18/2024Country: USATicker: CAG

Record Date: 07/25/2024Meeting Type: Annual

Primary Security ID: 205887102

Shares Voted: 1,811

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anil Arora	Mgmt	For	For	For
1b	Elect Director Thomas "Tony" K. Brown	Mgmt	For	For	For
1c	Elect Director Emanuel "Manny" Chirico	Mgmt	For	For	For
1d	Elect Director Sean M. Connolly	Mgmt	For	For	For
1e	Elect Director George Dowdie	Mgmt	For	For	For
1f	Elect Director Francisco Fraga	Mgmt	For	For	For
1g	Elect Director Fran Horowitz	Mgmt	For	For	For
1h	Elect Director Richard H. Lenny	Mgmt	For	For	For
1i	Elect Director Melissa Lora	Mgmt	For	For	For
1j	Elect Director Ruth Ann Marshall	Mgmt	For	For	For
1k	Elect Director Denise A. Paulonis	Mgmt	For	For	For
2	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Darden Restaurants, Inc.

Meeting Date: 09/18/2024Country: USATicker: DRI

Record Date: 07/24/2024Meeting Type: Annual

Primary Security ID: 237194105

Shares Voted: 402

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Margaret Shan Atkins	Mgmt	For	For	For
1.2	Elect Director Ricardo (Rick) Cardenas	Mgmt	For	For	For
1.3	Elect Director Juliana L. Chugg	Mgmt	For	For	For
1.4	Elect Director James P. Fogarty	Mgmt	For	For	For

Darden Restaurants, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Cynthia T. Jamison	Mgmt	For	For	For
1.6	Elect Director Nana Mensah	Mgmt	For	For	For
1.7	Elect Director William S. Simon	Mgmt	For	For	For
1.8	Elect Director Charles M. Sonsteby	Mgmt	For	For	For
1.9	Elect Director Timothy J. Wilmott	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Disclose Poultry Welfare Indicators *Withdrawn Resolution*	SH			
6	Report on Targets to Phase Out Use of Gestation Crates in Pork Supply Chain	SH	Against	For	For
7	Comply with World Health Organization Guidelines on Antimicrobial Use Throughout Supply Chains	SH	Against	Against	Against
8	Report on Efforts to Reduce GHG Emissions in Alignment with Paris Agreement Goal	SH	Against	For	For

Take-Two Interactive Software, Inc.

Meeting Date: 09/18/2024

Record Date: 07/23/2024

Primary Security ID: 874054109

Country: USA

Meeting Type: Annual

Ticker: TTWO

Shares Voted: 593

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Strauss Zelnick	Mgmt	For	For	For
1b	Elect Director Michael Dornemann	Mgmt	For	For	For
1c	Elect Director J Moses	Mgmt	For	For	For
1d	Elect Director Michael Sheresky	Mgmt	For	For	For
1e	Elect Director LaVerne Srinivasan	Mgmt	For	For	For
1f	Elect Director Susan Tolson	Mgmt	For	For	For
1g	Elect Director Paul Viera	Mgmt	For	For	For

Take-Two Interactive Software, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Roland Hernandez	Mgmt	For	For	For
1i	Elect Director William "Bing" Gordon	Mgmt	For	For	For
1j	Elect Director Ellen Siminoff	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

FedEx Corporation

Meeting Date: 09/23/2024

Record Date: 07/29/2024

Primary Security ID: 31428X106

Country: USA

Meeting Type: Annual

Ticker: FDX

Shares Voted: 804

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Silvia Davila	Mgmt	For	For	For
1b	Elect Director Marvin R. Ellison	Mgmt	For	For	For
1c	Elect Director Stephen E. Gorman	Mgmt	For	For	For
1d	Elect Director Susan Patricia Griffith	Mgmt	For	For	For
1e	Elect Director Amy B. Lane	Mgmt	For	For	For
1f	Elect Director R. Brad Martin	Mgmt	For	For	For
1g	Elect Director Nancy A. Norton	Mgmt	For	For	For
1h	Elect Director Frederick P. Perpall	Mgmt	For	For	For
1i	Elect Director Joshua Cooper Ramo	Mgmt	For	For	For
1j	Elect Director Susan C. Schwab	Mgmt	For	For	For
1k	Elect Director Frederick W. Smith	Mgmt	For	For	For
1l	Elect Director David P. Steiner	Mgmt	For	For	For
1m	Elect Director Rajesh Subramaniam	Mgmt	For	For	For
1n	Elect Director Paul S. Walsh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

FedEx Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Remove Pass-Through Voting Provision	Mgmt	For	For	For
6	Report on "Just Transition"	SH	Against	For	For
7	Require Shareholder Approval of Bylaw Amendments Adopted by the Board of Directors	SH	Against	Against	Against
8	Report on Framework to Assess Company Lobbying Alignment with Climate Goals	SH	Against	For	For

General Mills, Inc.

Meeting Date: 09/24/2024

Record Date: 07/26/2024

Primary Security ID: 370334104

Country: USA

Meeting Type: Annual

Ticker: GIS

Shares Voted: 2,086					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Benno O. Dorer	Mgmt	For	For	For
1b	Elect Director C. Kim Goodwin	Mgmt	For	For	For
1c	Elect Director Jeffrey L. Harmening	Mgmt	For	For	For
1d	Elect Director Maria G. Henry	Mgmt	For	For	For
1e	Elect Director Jo Ann Jenkins	Mgmt	For	For	For
1f	Elect Director Elizabeth C. Lempres	Mgmt	For	For	For
1g	Elect Director John G. Morikis	Mgmt	For	For	For
1h	Elect Director Diane L. Neal	Mgmt	For	For	For
1i	Elect Director Steve Odland	Mgmt	For	For	For
1j	Elect Director Maria A. Sastre	Mgmt	For	For	For
1k	Elect Director Eric D. Sprunk	Mgmt	For	For	For
1l	Elect Director Jorge A. Uribe	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

General Mills, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Disclose Regenerative Agriculture Practices Within Supply Chain	SH	Against	For	For
5	Report on Efforts to Reduce Plastic Use	SH	Against	For	For

Lamb Weston Holdings, Inc.

**Meeting Date:** 09/26/2024

**Country:** USA

**Ticker:** LW

**Record Date:** 07/29/2024

**Meeting Type:** Annual

**Primary Security ID:** 513272104

Shares Voted: 508

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter J. Bensen	Mgmt	For	For	For
1b	Elect Director Charles A. Blixt	Mgmt	For	For	For
1c	Elect Director Robert J. Coviello	Mgmt	For	For	For
1d	Elect Director Rita Fisher	Mgmt	For	For	For
1e	Elect Director Andre J. Hawaux	Mgmt	For	For	For
1f	Elect Director W.G. Jurgensen	Mgmt	For	For	For
1g	Elect Director Hala G. Modellmog	Mgmt	For	For	For
1h	Elect Director Robert A. Niblock	Mgmt	For	For	For
1i	Elect Director Maria Renna Sharpe	Mgmt	For	For	For
1j	Elect Director Thomas P. Werner	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For

Trimble Inc.

**Meeting Date:** 09/30/2024

**Country:** USA

**Ticker:** TRMB

**Record Date:** 04/01/2024

**Meeting Type:** Annual

**Primary Security ID:** 896239100



Trimble Inc.

Shares Voted: 2,044

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director James C. Dalton	Mgmt	For	For	For
1.2	Elect Director Borje Ekholm	Mgmt	For	For	For
1.3	Elect Director Kaigham (Ken) Gabriel	Mgmt	For	For	For
1.4	Elect Director Meaghan Lloyd	Mgmt	For	For	For
1.5	Elect Director Ronald S. Nersesian	Mgmt	For	For	For
1.6	Elect Director Robert G. Painter	Mgmt	For	For	For
1.7	Elect Director Mark S. Peek	Mgmt	For	For	For
1.8	Elect Director Kara Sprague	Mgmt	For	For	For
1.9	Elect Director Thomas Sweet	Mgmt	For	For	For
1.10	Elect Director Johan Wibergh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

RPM International Inc.

Meeting Date: 10/03/2024Country: USATicker: RPM

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

Primary Security ID: 749685103

Shares Voted: 2

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Declassify the Board of Directors	Mgmt	For	For	For
2.1	Elect Director Bruce A. Carbonari	Mgmt	For	For	For
2.2	Elect Director Jenniffer D. Deckard	Mgmt	For	For	For
2.3	Elect Director Salvatore D. Fazzolari	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For

RPM International Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

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: 8,502

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

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: 1,159

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

International Paper Company

Meeting Date: 10/11/2024

Record Date: 09/12/2024

Primary Security ID: 460146103

Country: USA

Meeting Type: Special

Ticker: IP

Shares Voted: 15

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Issue Shares in Connection with Acquisition	Mgmt	For	For	For
2	Adjourn Meeting	Mgmt	For	For	For

Medtronic Plc

Meeting Date: 10/17/2024

Record Date: 08/23/2024

Primary Security ID: G5960L103

Country: Ireland

Meeting Type: Annual

Ticker: MDT

Shares Voted: 4,669

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Craig Arnold	Mgmt	For	For	For
1b	Elect Director Scott C. Donnelly	Mgmt	For	For	For
1c	Elect Director Lidia L. Fonseca	Mgmt	For	For	For
1d	Elect Director Andrea J. Goldsmith	Mgmt	For	For	For
1e	Elect Director Randall J. Hogan, III	Mgmt	For	For	For
1f	Elect Director Gregory P. Lewis	Mgmt	For	For	For
1g	Elect Director Kevin E. Lofton	Mgmt	For	For	For
1h	Elect Director Geoffrey S. Martha	Mgmt	For	For	For
1i	Elect Director Elizabeth G. Nabel	Mgmt	For	For	For
1j	Elect Director Kendall J. Powell	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors and Authorize Board to fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For	For
5	Renew the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	For	For	For
6	Authorize Overseas Market Purchases of Ordinary Shares	Mgmt	For	For	For

Parker-Hannifin Corporation

Meeting Date: 10/23/2024

Record Date: 09/06/2024

Primary Security ID: 701094104

Country: USA

Meeting Type: Annual

Ticker: PH

Parker-Hannifin Corporation

Shares Voted: 456

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Denise Russell Fleming	Mgmt	For	For	For
1b	Elect Director Lance M. Fritz	Mgmt	For	For	For
1c	Elect Director Linda A. Harty	Mgmt	For	For	For
1d	Elect Director Kevin A. Lobo	Mgmt	For	For	For
1e	Elect Director Jennifer A. Parmentier	Mgmt	For	For	For
1f	Elect Director E. Jean Savage	Mgmt	For	For	For
1g	Elect Director Joseph Scaminace	Mgmt	For	For	For
1h	Elect Director Laura K. Thompson	Mgmt	For	For	For
1i	Elect Director James R. Verrier	Mgmt	For	For	For
1j	Elect Director James L. Wainscott	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Cintas Corporation

Meeting Date: 10/29/2024Country: USATicker: CTAS

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

Primary Security ID: 172908105

Shares Voted: 317

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Melanie W. Barstad	Mgmt	For	For	For
1b	Elect Director Beverly K. Carmichael	Mgmt	For	For	For
1c	Elect Director Karen L. Carnahan	Mgmt	For	For	For
1d	Elect Director Robert E. Coletti	Mgmt	For	For	For
1e	Elect Director Scott D. Farmer	Mgmt	For	For	For
1f	Elect Director Martin Mucci	Mgmt	For	For	For
1g	Elect Director Joseph Scaminace	Mgmt	For	For	For

Cintas Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Todd M. Schneider	Mgmt	For	For	For
1i	Elect Director Ronald W. Tysoe	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Report on Effectiveness of Diversity, Equity and Inclusion Efforts and Metrics	SH	Against	For	For
6	Report on Efforts to Reduce GHG Emissions in Alignment with Paris Agreement Goal	SH	Against	For	For
7	Report on Political Contributions	SH	Against	For	For

Kellanova

Meeting Date: 11/01/2024

Country: USA

Ticker: K

Record Date: 09/24/2024

Meeting Type: Special

Primary Security ID: 487836108

Shares Voted: 1,059

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	For	For	For
2	Advisory Vote on Golden Parachutes	Mgmt	For	Against	Against
3	Adjourn Meeting	Mgmt	For	For	For

Lam Research Corporation

Meeting Date: 11/05/2024

Country: USA

Ticker: LRCX

Record Date: 09/06/2024

Meeting Type: Annual

Primary Security ID: 512807306

Shares Voted: 477

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sohail U. Ahmed	Mgmt	For	For	For
1b	Elect Director Timothy M. Archer	Mgmt	For	For	For

Lam Research Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Eric K. Brandt	Mgmt	For	For	For
1d	Elect Director Ita M. Brennan	Mgmt	For	For	For
1e	Elect Director Michael R. Cannon	Mgmt	For	For	For
1f	Elect Director John M. Dineen	Mgmt	For	For	For
1g	Elect Director Mark Fields	Mgmt	For	For	For
1h	Elect Director Ho Kyu Kang	Mgmt	For	For	For
1i	Elect Director Bethany J. Mayer	Mgmt	For	For	For
1j	Elect Director Jyoti K. Mehra	Mgmt	For	For	For
1k	Elect Director Abhijit Y. Talwalkar	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Automatic Data Processing, Inc.

Meeting Date: 11/06/2024

Country: USA

Ticker: ADP

Record Date: 09/09/2024

Meeting Type: Annual

Primary Security ID: 053015103

Shares Voted: 1,494

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter Bisson	Mgmt	For	For	For
1b	Elect Director Maria Black	Mgmt	For	For	For
1c	Elect Director David V. Goeckeler	Mgmt	For	For	For
1d	Elect Director Linnie M. Haynesworth	Mgmt	For	For	For
1e	Elect Director John P. Jones	Mgmt	For	For	For
1f	Elect Director Francine S. Katsoudas	Mgmt	For	For	For
1g	Elect Director Nazzic S. Keene	Mgmt	For	For	For
1h	Elect Director Thomas J. Lynch	Mgmt	For	For	For
1i	Elect Director Scott F. Powers	Mgmt	For	For	For
1j	Elect Director William J. Ready	Mgmt	For	For	For
1k	Elect Director Carlos A. Rodriguez	Mgmt	For	For	For

Automatic Data Processing, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Sandra S. Wijnberg	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Cardinal Health, Inc.

Meeting Date: 11/06/2024Country: USATicker: CAH

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

Primary Security ID: 14149Y108

Shares Voted: 881

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert W. Azelby	Mgmt	For	For	For
1b	Elect Director Michelle M. Brennan	Mgmt	For	For	For
1c	Elect Director Sheri H. Edison	Mgmt	For	For	For
1d	Elect Director David C. Evans	Mgmt	For	For	For
1e	Elect Director Patricia A. Hemingway Hall	Mgmt	For	For	For
1f	Elect Director Jason M. Hollar	Mgmt	For	For	For
1g	Elect Director Akhil Johri	Mgmt	For	For	For
1h	Elect Director Gregory B. Kenny	Mgmt	For	For	For
1i	Elect Director Nancy Killefer	Mgmt	For	For	For
1j	Elect Director Christine A. Mundkur	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Adopt Policy on Improved Majority Voting for Election of Directors	SH	Against	Against	Against

KLA Corporation

Meeting Date: 11/06/2024Country: USATicker: KLAC

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

Primary Security ID: 482480100



Shares Voted: 493

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert Calderoni	Mgmt	For	For	For
1.2	Elect Director Jeneanne Hanley	Mgmt	For	For	For
1.3	Elect Director Emiko Higashi	Mgmt	For	For	For
1.4	Elect Director Kevin Kennedy	Mgmt	For	For	For
1.5	Elect Director Michael McMullen	Mgmt	For	For	For
1.6	Elect Director Gary Moore	Mgmt	For	For	For
1.7	Elect Director Victor Peng	Mgmt	For	For	For
1.8	Elect Director Robert Rango	Mgmt	For	For	For
1.9	Elect Director Richard P. Wallace	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	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: 786

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

Jack Henry & Associates, Inc.

Meeting Date: 11/12/2024Country: USATicker: JKHY

Record Date: 09/16/2024Meeting Type: Annual

Primary Security ID: 426281101

Shares Voted: 267

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director David B. Foss	Mgmt	For	For	For
1.2	Elect Director Matthew C. Flanigan	Mgmt	For	For	For
1.3	Elect Director Thomas H. Wilson, Jr.	Mgmt	For	For	For
1.4	Elect Director Thomas A. Wimsett	Mgmt	For	For	For
1.5	Elect Director Shruti S. Miyashiro	Mgmt	For	For	For
1.6	Elect Director Wesley A. Brown	Mgmt	For	For	For
1.7	Elect Director Curtis A. Campbell	Mgmt	For	For	For
1.8	Elect Director Tammy S. LoCascio	Mgmt	For	For	For
1.9	Elect Director Lisa M. Nelson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Eliminate Supermajority Vote Requirement to Amend Certificate of Incorporation and Bylaws	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Broadridge Financial Solutions, Inc.

Meeting Date: 11/14/2024Country: USATicker: BR

Record Date: 09/18/2024Meeting Type: Annual

Primary Security ID: 11133T103

Shares Voted: 415

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Pamela L. Carter	Mgmt	For	For	For
1b	Elect Director Richard J. Daly	Mgmt	For	For	For
1c	Elect Director Robert N. Duelks	Mgmt	For	For	For
1d	Elect Director Melvin L. Flowers	Mgmt	For	For	For

Broadridge Financial Solutions, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Timothy C. Gokey	Mgmt	For	For	For
1f	Elect Director Brett A. Keller	Mgmt	For	For	For
1g	Elect Director Maura A. Markus	Mgmt	For	For	For
1h	Elect Director Eileen K. Murray	Mgmt	For	For	For
1i	Elect Director Annette L. Nazareth	Mgmt	For	For	For
1j	Elect Director Amit K. Zavery	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Oracle Corporation

Meeting Date: 11/14/2024Country: USATicker: ORCL

Record Date: 09/16/2024Meeting Type: Annual

Primary Security ID: 68389X105

Shares Voted: 5,819					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Awo Ablo	Mgmt	For	For	For
1.2	Elect Director Jeffrey S. Berg	Mgmt	For	Withhold	Withhold
1.3	Elect Director Michael J. Boskin	Mgmt	For	For	For
1.4	Elect Director Safra A. Catz	Mgmt	For	For	For
1.5	Elect Director Bruce R. Chizen	Mgmt	For	Withhold	Withhold
1.6	Elect Director George H. Conrades	Mgmt	For	For	For
1.7	Elect Director Lawrence J. Ellison	Mgmt	For	For	For
1.8	Elect Director Rona A. Fairhead	Mgmt	For	For	For
1.9	Elect Director Jeffrey O. Henley	Mgmt	For	For	For
1.10	Elect Director Charles W. Moorman	Mgmt	For	For	For
1.11	Elect Director Leon E. Panetta	Mgmt	For	Withhold	Withhold
1.12	Elect Director William G. Parrett	Mgmt	For	Withhold	Withhold
1.13	Elect Director Naomi O. Seligman	Mgmt	For	For	For

Oracle Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Climate Risk in Retirement Plan Options	SH	Against	Against	Against

The Trade Desk, Inc.

Meeting Date: 11/14/2024	Country: USA	Ticker: TTD
Record Date: 09/26/2024	Meeting Type: Special	
Primary Security ID: 88339J105		

Shares Voted: 1,696

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Change State of Incorporation from Delaware to Nevada	Mgmt	For	Against	Against
2	Adjourn Meeting	Mgmt	For	Against	Against

Sysco Corporation

Meeting Date: 11/15/2024	Country: USA	Ticker: SYT
Record Date: 09/16/2024	Meeting Type: Annual	
Primary Security ID: 871829107		

Shares Voted: 1,851

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel J. Brutto	Mgmt	For	For	For
1b	Elect Director Francesca DeBiase	Mgmt	For	For	For
1c	Elect Director Ali Dibadj	Mgmt	For	For	For
1d	Elect Director Larry C. Glasscock	Mgmt	For	For	For
1e	Elect Director Jill M. Golder	Mgmt	For	For	For
1f	Elect Director Bradley M. Halverson	Mgmt	For	For	For
1g	Elect Director John M. Hinshaw	Mgmt	For	For	For
1h	Elect Director Kevin P. Hourican	Mgmt	For	For	For
1i	Elect Director Roberto Marques	Mgmt	For	For	For

Sysco Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Alison Kenney Paul	Mgmt	For	For	For
1k	Elect Director Sheila G. Talton	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Adopt Measurable Time Bound Goals to Ensure Group Sow Housing for Private Brand Pork Products	SH	Against	For	For

ResMed Inc.

Meeting Date: 11/20/2024	Country: USA	Ticker: RMD
Record Date: 09/24/2024	Meeting Type: Annual	
Primary Security ID: 761152107		

Shares Voted: 22

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carol Burt	Mgmt	For	For	For
1b	Elect Director Christopher DeOrefice	Mgmt	For	For	For
1c	Elect Director Jan De Witte	Mgmt	For	For	For
1d	Elect Director Karen Drexler	Mgmt	For	For	For
1e	Elect Director Michael "Mick" Farrell	Mgmt	For	For	For
1f	Elect Director Peter Farrell	Mgmt	For	For	For
1g	Elect Director Harjit Gill	Mgmt	For	For	For
1h	Elect Director John Hernandez	Mgmt	For	For	For
1i	Elect Director Richard "Rich" Sulpizio	Mgmt	For	For	For
1j	Elect Director Desney Tan	Mgmt	For	For	For
1k	Elect Director Ronald "Ron" Taylor	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

## The Clorox Company

Meeting Date: 11/20/2024

Record Date: 09/23/2024

Primary Security ID: 189054109

Country: USA

Meeting Type: Annual

Ticker: CLX

Shares Voted: 441

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Stephen B. Bratspies	Mgmt	For	For	For
1.2	Elect Director Pierre R. Breber	Mgmt	For	For	For
1.3	Elect Director Julia Denman	Mgmt	For	For	For
1.4	Elect Director Spencer C. Fleischer	Mgmt	For	For	For
1.5	Elect Director Esther Lee	Mgmt	For	For	For
1.6	Elect Director A.D. David Mackay	Mgmt	For	For	For
1.7	Elect Director Stephanie Plaines	Mgmt	For	For	For
1.8	Elect Director Linda Rendle	Mgmt	For	For	For
1.9	Elect Director Matthew J. Shattock	Mgmt	For	For	For
1.10	Elect Director Russell J. Weiner	Mgmt	For	For	For
1.11	Elect Director Christopher J. Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## Western Digital Corporation

Meeting Date: 11/20/2024

Record Date: 09/23/2024

Primary Security ID: 958102105

Country: USA

Meeting Type: Annual

Ticker: WDC

Shares Voted: 1,256

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kimberly E. Alexy	Mgmt	For	For	For
1b	Elect Director Thomas Caulfield	Mgmt	For	For	For
1c	Elect Director Martin I. Cole	Mgmt	For	For	For
1d	Elect Director Tunc Doluca	Mgmt	For	For	For

Western Digital Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director David V. Goeckeler	Mgmt	For	For	For
1f	Elect Director Matthew E. Massengill	Mgmt	For	For	For
1g	Elect Director Stephanie A. Streeter	Mgmt	For	For	For
1h	Elect Director Miyuki Suzuki	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Copart, Inc.

Meeting Date: 12/06/2024

Country: USA

Ticker: CPRT

Record Date: 10/11/2024

Meeting Type: Annual

Primary Security ID: 217204106

Shares Voted: 3,201

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Willis J. Johnson	Mgmt	For	For	For
1.2	Elect Director A. Jayson Adair	Mgmt	For	For	For
1.3	Elect Director Matt Blunt	Mgmt	For	For	For
1.4	Elect Director Steven D. Cohan	Mgmt	For	For	For
1.5	Elect Director Daniel J. Englander	Mgmt	For	For	For
1.6	Elect Director James E. Meeks	Mgmt	For	For	For
1.7	Elect Director Thomas N. Tryforos	Mgmt	For	For	For
1.8	Elect Director Diane M. Morefield	Mgmt	For	For	For
1.9	Elect Director Stephen Fisher	Mgmt	For	For	For
1.10	Elect Director Cherylyn Harley LeBon	Mgmt	For	For	For
1.11	Elect Director Carl D. Sparks	Mgmt	For	For	For
1.12	Elect Director Jeffrey Liaw	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Viatris Inc.

Meeting Date: 12/06/2024
Country: USA
Ticker: VTRS

Record Date: 10/11/2024
Meeting Type: Annual

Primary Security ID: 92556V106

Shares Voted: 4,530

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director W. Don Cornwell	Mgmt	For	For	For
1B	Elect Director JoEllen Lyons Dillon	Mgmt	For	For	For
1C	Elect Director Elisha Finney	Mgmt	For	For	For
1D	Elect Director Leo Groothuis	Mgmt	For	For	For
1E	Elect Director Melina Higgins	Mgmt	For	For	For
1F	Elect Director James M. Kilts	Mgmt	For	For	For
1G	Elect Director Harry Korman	Mgmt	For	For	For
1H	Elect Director Rajiv Malik	Mgmt	For	For	For
1I	Elect Director Richard Mark	Mgmt	For	For	For
1J	Elect Director Mark Parrish	Mgmt	For	For	For
1K	Elect Director Scott A. Smith	Mgmt	For	For	For
1L	Elect Director Rogerio Vivaldi Coelho	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Cisco Systems, Inc.

Meeting Date: 12/09/2024
Country: USA
Ticker: CSCO

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

Primary Security ID: 17275R102

Shares Voted: 15,061

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wesley G. Bush	Mgmt	For	For	For
1b	Elect Director Michael D. Capellas	Mgmt	For	For	For
1c	Elect Director Mark Garrett	Mgmt	For	For	For
1d	Elect Director John D. Harris, II	Mgmt	For	For	For



Cisco Systems, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Kristina M. Johnson	Mgmt	For	For	For
1f	Elect Director Sarah Rae Murphy	Mgmt	For	For	For
1g	Elect Director Charles H. Robbins	Mgmt	For	For	For
1h	Elect Director Daniel H. Schulman	Mgmt	For	For	For
1i	Elect Director Marianna Tessel	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Microsoft Corporation

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

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

Primary Security ID: 594918104

Shares Voted: 27,256

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

Microsoft Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Risks of Weapons Development	SH	Against	Against	Against
5	Assess and Report on Investing in Bitcoin	SH	Against	Against	Against
6	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Against	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
8	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Against	Against	Against
9	Report on AI Data Sourcing Accountability	SH	Against	For	For

Palo Alto Networks, Inc.

Meeting Date: 12/10/2024

Record Date: 10/18/2024

Primary Security ID: 697435105

Country: USA

Meeting Type: Annual

Ticker: PANW

Shares Voted: 1,204

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John Key	Mgmt	For	For	For
1b	Elect Director Mary Pat McCarthy	Mgmt	For	For	For
1c	Elect Director Nir Zuk	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
5	Amend Omnibus Stock Plan	Mgmt	For	For	For
6	Report on Climate Risk in Retirement Plan Options	SH	Against	Against	Against

Atlassian Corporation

Meeting Date: 12/11/2024

Record Date: 10/14/2024

Primary Security ID: 049468101

Country: USA

Meeting Type: Annual

Ticker: TEAM

Shares Voted: 614

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Scott Belsky	Mgmt	For	For	For
1b	Elect Director Shona L. Brown	Mgmt	For	For	For
1c	Elect Director Michael Cannon-Brookes	Mgmt	For	Against	Against
1d	Elect Director Scott Farquhar	Mgmt	For	Against	Against
1e	Elect Director Heather M. Fernandez	Mgmt	For	Against	Against
1f	Elect Director Sasan Goodarzi	Mgmt	For	For	For
1g	Elect Director Jay Parikh	Mgmt	For	For	For
1h	Elect Director Enrique Salem	Mgmt	For	Against	Against
1i	Elect Director Steven Sordello	Mgmt	For	For	For
1j	Elect Director Richard P. Wong	Mgmt	For	Against	Against
1k	Elect Director Michelle Zatlyn	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Nutanix, Inc.

Meeting Date: 12/13/2024

Record Date: 11/07/2024

Primary Security ID: 67059N108

Country: USA

Meeting Type: Annual

Ticker: NTNX

Shares Voted: 923

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Max de Groen	Mgmt	For	For	For
1b	Elect Director Steven J. Gomo	Mgmt	For	For	For
1c	Elect Director Mark Templeton	Mgmt	For	For	For
1d	Elect Director Craig Conway	Mgmt	For	For	For
1e	Elect Director Virginia Gambale	Mgmt	For	For	For
1f	Elect Director Brian Stevens	Mgmt	For	For	For

Nutanix, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year

AutoZone, Inc.

Meeting Date: 12/18/2024

Country: USA

Ticker: AZO

Record Date: 10/21/2024

Meeting Type: Annual

Primary Security ID: 053332102

Shares Voted: 62					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Philip B. Daniele, III	Mgmt	For	For	For
1.2	Elect Director Michael A. George	Mgmt	For	For	For
1.3	Elect Director Linda A. Goodspeed	Mgmt	For	For	For
1.4	Elect Director Earl G. Graves, Jr.	Mgmt	For	For	For
1.5	Elect Director Brian P. Hannasch	Mgmt	For	For	For
1.6	Elect Director Gale V. King	Mgmt	For	For	For
1.7	Elect Director George R. Mrkonic, Jr.	Mgmt	For	For	For
1.8	Elect Director William C. Rhodes, III	Mgmt	For	For	For
1.9	Elect Director Jill A. Soltau	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting to 25%	Mgmt	For	For	For
5	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

FactSet Research Systems Inc.

Meeting Date: 12/19/2024

Record Date: 10/21/2024

Primary Security ID: 303075105

Country: USA

Meeting Type: Annual

Ticker: FDS

Shares Voted: 127

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Siew Kai Choy	Mgmt	For	For	For
1b	Elect Director Laurie G. Hylton	Mgmt	For	For	For
1c	Elect Director Lee Shavel	Mgmt	For	For	For
1d	Elect Director Elisha Wiesel	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Zscaler, Inc.

Meeting Date: 01/10/2025

Record Date: 11/13/2024

Primary Security ID: 98980G102

Country: USA

Meeting Type: Annual

Ticker: ZS

Shares Voted: 87

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Karen Blasing	Mgmt	For	For	For
1.2	Elect Director Charles Giancarlo	Mgmt	For	Withhold	Withhold
1.3	Elect Director Eileen Naughton	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against

D.R. Horton, Inc.

Meeting Date: 01/16/2025

Record Date: 11/29/2024

Primary Security ID: 23331A109

Country: USA

Meeting Type: Annual

Ticker: DHI

D.R. Horton, Inc.

Shares Voted: 1,165

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David V. Auld	Mgmt	For	For	For
1b	Elect Director Paul J. Romanowski	Mgmt	For	For	For
1c	Elect Director Brad S. Anderson	Mgmt	For	For	For
1d	Elect Director Michael R. Buchanan	Mgmt	For	For	For
1e	Elect Director Benjamin S. Carson, Sr.	Mgmt	For	For	For
1f	Elect Director M. Chad Crow	Mgmt	For	For	For
1g	Elect Director Elaine D. Crowley	Mgmt	For	For	For
1h	Elect Director Maribess L. Miller	Mgmt	For	For	For
1i	Elect Director Barbara R. Smith	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Micron Technology, Inc.

Meeting Date: 01/16/2025Country: USATicker: MU

Record Date: 11/18/2024Meeting Type: Annual

Primary Security ID: 595112103

Shares Voted: 4,354

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard M. Beyer	Mgmt	For	For	For
1b	Elect Director Lynn A. Dugle	Mgmt	For	For	For
1c	Elect Director Steven J. Gomo	Mgmt	For	For	For
1d	Elect Director Linnie M. Haynesworth	Mgmt	For	For	For
1e	Elect Director Mary Pat McCarthy	Mgmt	For	For	For
1f	Elect Director Sanjay Mehrotra	Mgmt	For	For	For
1g	Elect Director Robert Swan	Mgmt	For	For	For
1h	Elect Director MaryAnn Wright	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Micron Technology, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

MicroStrategy Incorporated

Meeting Date: 01/21/2025	Country: USA	Ticker: MSTR
Record Date: 01/02/2025	Meeting Type: Special	
Primary Security ID: 594972408		

Shares Voted: 791

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Increase Authorized Class A Common Stock	Mgmt	For	Against	Against
2	Increase Authorized Preferred Stock	Mgmt	For	Against	Against
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Adjourn Meeting	Mgmt	For	Against	Against

Air Products and Chemicals, Inc.

Meeting Date: 01/23/2025	Country: USA	Ticker: APD
Record Date: 11/27/2024	Meeting Type: Proxy Contest	
Primary Security ID: 009158106		

Shares Voted: 872

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Management Universal Proxy (White Proxy Card)	Mgmt			
	From the Combined List of Management & Dissident Nominees - Elect 9 Directors	Mgmt			
1a	Elect Management Nominee Director Tonit M. Calaway	Mgmt	For	Do Not Vote	Do Not Vote
1b	Elect Management Nominee Director Charles "Casey" Cogut	Mgmt	For	Do Not Vote	Do Not Vote
1c	Elect Management Nominee Director Lisa A. Davis	Mgmt	For	Do Not Vote	Do Not Vote
1d	Elect Management Nominee Director Seifollah "Seifi" Ghasemi	Mgmt	For	Do Not Vote	Do Not Vote
1e	Elect Management Nominee Director Jessica Trocchi Graziano	Mgmt	For	Do Not Vote	Do Not Vote

Air Products and Chemicals, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Management Nominee Director Edward L. Monser	Mgmt	For	Do Not Vote	Do Not Vote
1g	Elect Management Nominee Director Bhavesh V. "Bob" Patel	Mgmt	For	Do Not Vote	Do Not Vote
1h	Elect Management Nominee Director Wayne T. Smith	Mgmt	For	Do Not Vote	Do Not Vote
1i	Elect Management Nominee Director Alfred Stern	Mgmt	For	Do Not Vote	Do Not Vote
1j	Elect Dissident Nominee Director Andrew Evans	SH	Withhold	Do Not Vote	Do Not Vote
1k	Elect Dissident Nominee Director Paul Hilal	SH	Withhold	Do Not Vote	Do Not Vote
1l	Elect Dissident Nominee Director Tracy McKibben	SH	Withhold	Do Not Vote	Do Not Vote
1m	Elect Dissident Nominee Director Dennis Reilley	SH	Withhold	Do Not Vote	Do Not Vote
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Do Not Vote	Do Not Vote
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	Do Not Vote	Do Not Vote
4	Repeal Any Bylaw Provisions or Amendments Without Shareholder Approval Subsequent to September 17, 2023	SH	Against	Do Not Vote	Do Not Vote
	Dissident Universal Proxy (Blue Proxy Card)	Mgmt			
	From the Combined List of Management & Dissident Nominees - Elect 9 Directors	Mgmt			
1a	Elect Dissident Nominee Director Andrew Evans	SH	For	For	For
1b	Elect Dissident Nominee Director Paul Hilal	SH	For	For	For
1c	Elect Dissident Nominee Director Tracy McKibben	SH	For	Withhold	Withhold
1d	Elect Dissident Nominee Director Dennis Reilley	SH	For	For	For
1e	Elect Management Nominee Director Charles "Casey" Cogut	Mgmt	Withhold	Withhold	Withhold
1f	Elect Management Nominee Director Lisa A. Davis	Mgmt	Withhold	For	For
1g	Elect Management Nominee Director Seifollah "Seifi" Ghasemi	Mgmt	Withhold	Withhold	Withhold
1h	Elect Management Nominee Director Edward L. Monser	Mgmt	Withhold	Withhold	Withhold
1i	Elect Management Nominee Director Tonit M. Calaway	Mgmt	For	For	For



Air Products and Chemicals, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Management Nominee Director Jessica Trocchi Graziano	Mgmt	For	For	For
1k	Elect Management Nominee Director Bhavesh V. "Bob" Patel	Mgmt	For	For	For
1l	Elect Management Nominee Director Wayne T. Smith	Mgmt	For	For	For
1m	Elect Management Nominee Director Alfred Stern	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	None	For	For
4	Repeal Any Bylaw Provisions or Amendments Without Shareholder Approval Subsequent to September 17, 2023	SH	For	For	For

Costco Wholesale Corporation

Meeting Date: 01/23/2025

Country: USA

Ticker: COST

Record Date: 11/15/2024

Meeting Type: Annual

Primary Security ID: 22160K105

Shares Voted: 1,717

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan L. Decker	Mgmt	For	For	For
1b	Elect Director Kenneth D. Denman	Mgmt	For	For	For
1c	Elect Director Helena B. Foulkes	Mgmt	For	For	For
1d	Elect Director Hamilton E. James	Mgmt	For	For	For
1e	Elect Director Sally Jewell	Mgmt	For	For	For
1f	Elect Director Jeffrey S. Raikes	Mgmt	For	For	For
1g	Elect Director John W. Stanton	Mgmt	For	For	For
1h	Elect Director Ron M. Vachris	Mgmt	For	For	For
1i	Elect Director Mary Agnes (Maggie) Wilderotter	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Costco Wholesale Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Risks of Maintaining Diversity, Equity, and Inclusion Efforts	SH	Against	Against	Against

Intuit Inc.

Meeting Date: 01/23/2025	Country: USA	Ticker: INTU
Record Date: 11/25/2024	Meeting Type: Annual	
Primary Security ID: 461202103		

Shares Voted: 1,093

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eve Burton	Mgmt	For	For	For
1b	Elect Director Scott D. Cook	Mgmt	For	For	For
1c	Elect Director Richard L. Dalzell	Mgmt	For	For	For
1d	Elect Director Sasan K. Goodarzi	Mgmt	For	For	For
1e	Elect Director Deborah Liu	Mgmt	For	For	For
1f	Elect Director Takedra Mawakana	Mgmt	For	For	For
1g	Elect Director Suzanne Nora Johnson	Mgmt	For	For	For
1h	Elect Director Forrest Norrod	Mgmt	For	For	For
1i	Elect Director Vasant Prabhu	Mgmt	For	For	For
1j	Elect Director Ryan Roslansky	Mgmt	For	For	For
1k	Elect Director Thomas Szkutak	Mgmt	For	For	For
1l	Elect Director Raul Vazquez	Mgmt	For	For	For
1m	Elect Director Eric S. Yuan	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For

Jabil Inc.

Meeting Date: 01/23/2025	Country: USA	Ticker: JBL
Record Date: 11/29/2024	Meeting Type: Annual	
Primary Security ID: 466313103		

Shares Voted: 439

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anousheh Ansari	Mgmt	For	For	For
1b	Elect Director Michael Dastoor	Mgmt	For	For	For
1c	Elect Director Christopher S. Holland	Mgmt	For	For	For
1d	Elect Director Mark T. Mondello	Mgmt	For	For	For
1e	Elect Director John C. Plant	Mgmt	For	For	For
1f	Elect Director Steven A. Raymund	Mgmt	For	Against	Against
1g	Elect Director James Siminoff	Mgmt	For	For	For
1h	Elect Director N.V. "Tiger" Tyagarajan	Mgmt	For	For	For
1i	Elect Director Kathleen A. Walters	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	Against	Against
5	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against

Becton, Dickinson and Company

Meeting Date: 01/28/2025Country: USATicker: BDX

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

Primary Security ID: 075887109

Shares Voted: 1,172

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director William M. Brown	Mgmt	For	For	For
1.2	Elect Director Catherine M. Burzik	Mgmt	For	For	For
1.3	Elect Director Carrie L. Byington	Mgmt	For	For	For
1.4	Elect Director R. Andrew Eckert	Mgmt	For	For	For
1.5	Elect Director Claire M. Fraser	Mgmt	For	For	For

Becton, Dickinson and Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director Jeffrey W. Henderson	Mgmt	For	For	For
1.7	Elect Director Christopher Jones	Mgmt	For	For	For
1.8	Elect Director Thomas E. Polen	Mgmt	For	For	For
1.9	Elect Director Timothy M. Ring	Mgmt	For	For	For
1.10	Elect Director Bertram L. Scott	Mgmt	For	For	For
1.11	Elect Director Joanne Waldstreicher	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	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: 6,716

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For	For
1d	Elect Director Ramon Laguarta	Mgmt	For	For	For
1e	Elect Director Teri L. List	Mgmt	For	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For	For
1g	Elect Director Ryan McInerney	Mgmt	For	For	For
1h	Elect Director Denise M. Morrison	Mgmt	For	For	For
1i	Elect Director Pamela Murphy	Mgmt	For	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For	For
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Visa Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against	Against
5	Report on Company's Policy on Merchant Category Codes	SH	Against	Against	Against
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against
7	Report on Lobbying Payments and Policy	SH	Against	Against	Against

Jacobs Solutions, Inc.

Meeting Date: 01/29/2025	Country: USA	Ticker: J
Record Date: 12/02/2024	Meeting Type: Annual	
Primary Security ID: 46982L108		

Shares Voted: 488					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert V. Pragada	Mgmt	For	For	For
1b	Elect Director Louis V. Pinkham	Mgmt	For	For	For
1c	Elect Director Priya Abani	Mgmt	For	For	For
1d	Elect Director Michael M. Collins	Mgmt	For	For	For
1e	Elect Director Manny Fernandez	Mgmt	For	For	For
1f	Elect Director Mary M. Jackson	Mgmt	For	For	For
1g	Elect Director Georgette D. Kiser	Mgmt	For	For	For
1h	Elect Director Robert A. McNamara	Mgmt	For	For	For
1i	Elect Director Peter J. Robertson	Mgmt	For	For	For
1j	Elect Director Julie A. Sloat	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Eliminate Supermajority Vote Requirement for Changes to the Authorized Number of Shares of Preferred Stock	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement to Amend Bylaws	Mgmt	For	For	For

Jacobs Solutions, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Eliminate Supermajority Vote Requirement for Certain Significant Transactions	Mgmt	For	For	For
6	Eliminate Supermajority Vote Requirement to Amend Charter	Mgmt	For	For	For
7	Amend Charter to Remove Voluntary Reorganization Provision	Mgmt	For	For	For
8	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Emerson Electric Co.

Meeting Date: 02/04/2025

Record Date: 11/26/2024

Primary Security ID: 291011104

Country: USA

Meeting Type: Annual

Ticker: EMR

Shares Voted: 2,310

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Joshua B. Bolten	Mgmt	For	For	For
1b	Elect Director Calvin G. Butler, Jr.	Mgmt	For	For	For
1c	Elect Director Surendralal (Lal) L. Karsanbhai	Mgmt	For	For	For
1d	Elect Director Lori M. Lee	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Declassify the Board of Directors	Mgmt	For	For	For
4a	Reduce Supermajority Vote Requirement to Remove Directors	Mgmt	None	For	For
4b	Reduce Supermajority Vote Requirement in Connection with the Fair Price Provisions for Certain Business Combinations	Mgmt	None	For	For
4c	Reduce Supermajority Vote Requirement for Amendments to the Terms of any Series of Preferred Stock	Mgmt	None	For	For
5	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
6	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Rockwell Automation, Inc.

Meeting Date: 02/04/2025Country: USATicker: ROK

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

Primary Security ID: 773903109

Shares Voted: 453

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
A.1	Elect Director James P. Keane	Mgmt	For	For	For
A.2	Elect Director Blake D. Moret	Mgmt	For	For	For
A.3	Elect Director Thomas W. Rosamilia	Mgmt	For	For	For
A.4	Elect Director Patricia A. Watson	Mgmt	For	For	For
B	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
C	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Atmos Energy Corporation

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

Record Date: 12/13/2024Meeting Type: Annual

Primary Security ID: 049560105

Shares Voted: 639

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director J. Kevin Akers	Mgmt	For	For	For
1b	Elect Director John C. Ale	Mgmt	For	For	For
1c	Elect Director Kim R. Cocklin	Mgmt	For	For	For
1d	Elect Director Kelly H. Compton	Mgmt	For	For	For
1e	Elect Director Sean Donohue	Mgmt	For	For	For
1f	Elect Director Rafael G. Garza	Mgmt	For	For	For
1g	Elect Director Edward J. Geiser	Mgmt	For	For	For
1h	Elect Director Nancy K. Quinn	Mgmt	For	For	For
1i	Elect Director Richard A. Sampson	Mgmt	For	For	For
1j	Elect Director Telisa Toliver	Mgmt	For	For	For
1k	Elect Director Frank Yoho	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

# Atmos Energy Corporation

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

# Accenture plc

Meeting Date: 02/06/2025	Country: Ireland	Ticker: ACN
Record Date: 12/09/2024	Meeting Type: Annual	
Primary Security ID: G1151C101		

Shares Voted: 2,573

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jaime Ardila	Mgmt	For	For	For
1b	Elect Director Martin Brudermuller	Mgmt	For	For	For
1c	Elect Director Alan Jope	Mgmt	For	For	For
1d	Elect Director Nancy McKinstry	Mgmt	For	For	For
1e	Elect Director Jennifer Nason	Mgmt	For	For	For
1f	Elect Director Paula A. Price	Mgmt	For	For	For
1g	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For	For
1h	Elect Director Arun Sarin	Mgmt	For	For	For
1i	Elect Director Julie Sweet	Mgmt	For	For	For
1j	Elect Director Tracey T. Travis	Mgmt	For	For	For
1k	Elect Director Masahiko Uotani	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors and Authorise Their Remuneration	Mgmt	For	For	For
4	Approve Capital Reduction of the Share Premium Account	Mgmt	For	For	For
5	Authorize Board to Issue Shares under Irish Law	Mgmt	For	For	For
6	Authorize the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	For	For	For
7	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For



Tyson Foods, Inc.

Meeting Date: 02/06/2025

Record Date: 12/09/2024

Primary Security ID: 902494103

Country: USA

Meeting Type: Annual

Ticker: TSN

Shares Voted: 1,147

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John H. Tyson	Mgmt	For	Against	Against
1b	Elect Director Les R. Baledge	Mgmt	For	Against	Against
1c	Elect Director Mike Beebe	Mgmt	For	Against	Against
1d	Elect Director Maria Claudia Borras	Mgmt	For	Against	Against
1e	Elect Director David J. Bronczek	Mgmt	For	Against	Against
1f	Elect Director Donnie King	Mgmt	For	For	For
1g	Elect Director Maria N. Martinez	Mgmt	For	For	For
1h	Elect Director Kevin M. McNamara	Mgmt	For	For	For
1i	Elect Director Cheryl S. Miller	Mgmt	For	Against	Against
1j	Elect Director Kate B. Quinn	Mgmt	For	Against	Against
1k	Elect Director Jeffrey K. Schomburger	Mgmt	For	Against	Against
1l	Elect Director Barbara A. Tyson	Mgmt	For	Against	Against
1m	Elect Director Noel White	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Disclosure of Voting Results Based on Class of Shares	SH	Against	For	For

PTC Inc.

Meeting Date: 02/12/2025

Record Date: 12/13/2024

Primary Security ID: 69370C100

Country: USA

Meeting Type: Annual

Ticker: PTC

Shares Voted: 480

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Neil Barua	Mgmt	For	For	For
1.2	Elect Director Mark Benjamin	Mgmt	For	For	For
1.3	Elect Director Robert Bernshteyn	Mgmt	For	For	For

PTC Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Janice Chaffin	Mgmt	For	For	For
1.5	Elect Director Amar Hanspal	Mgmt	For	For	For
1.6	Elect Director Michal Katz	Mgmt	For	For	For
1.7	Elect Director Paul Lacy	Mgmt	For	For	For
1.8	Elect Director Corinna Lathan	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Capital One Financial Corporation

Meeting Date: 02/18/2025

Record Date: 12/27/2024

Primary Security ID: 14040H105

Country: USA

Meeting Type: Special

Ticker: COF

Shares Voted: 1,654

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Issue Shares in Connection with Merger	Mgmt	For	For	For
2	Adjourn Meeting	Mgmt	For	For	For

Discover Financial Services

Meeting Date: 02/18/2025

Record Date: 12/27/2024

Primary Security ID: 254709108

Country: USA

Meeting Type: Special

Ticker: DFS

Shares Voted: 1,084

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	For	For	For
2	Advisory Vote on Golden Parachutes	Mgmt	For	For	For
3	Adjourn Meeting	Mgmt	For	For	For

Raymond James Financial, Inc.

Meeting Date: 02/20/2025

Record Date: 12/18/2024

Primary Security ID: 754730109

Country: USA

Meeting Type: Annual

Ticker: RJF

Shares Voted: 763

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marlene Debel	Mgmt	For	For	For
1b	Elect Director Jeffrey N. Edwards	Mgmt	For	For	For
1c	Elect Director Benjamin C. Esty	Mgmt	For	For	For
1d	Elect Director Art A. Garcia	Mgmt	For	For	For
1e	Elect Director Anne Gates	Mgmt	For	For	For
1f	Elect Director Gordon L. Johnson	Mgmt	For	For	For
1g	Elect Director Raymond W. McDaniel, Jr.	Mgmt	For	For	For
1h	Elect Director Roderick C. McGearry	Mgmt	For	For	For
1i	Elect Director Cecily M. Mistarz	Mgmt	For	For	For
1j	Elect Director Paul C. Reilly	Mgmt	For	For	For
1k	Elect Director Raj Seshadri	Mgmt	For	For	For
1l	Elect Director Paul M. Shoukry	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Apple Inc.

Meeting Date: 02/25/2025

Record Date: 01/02/2025

Primary Security ID: 037833100

Country: USA

Meeting Type: Annual

Ticker: AAPL

Shares Voted: 65,684

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda Austin	Mgmt	For	For	For
1b	Elect Director Tim Cook	Mgmt	For	For	For
1c	Elect Director Alex Gorsky	Mgmt	For	For	For
1d	Elect Director Andrea Jung	Mgmt	For	For	For
1e	Elect Director Art Levinson	Mgmt	For	For	For

Apple Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Monica Lozano	Mgmt	For	For	For
1g	Elect Director Ron Sugar	Mgmt	For	For	For
1h	Elect Director Sue Wagner	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Ethical AI Data Acquisition and Usage	SH	Against	Against	Against
5	Report on Child Safety Online	SH	Against	Against	Against
6	Consider Abolishing DEI Policies, Programs, Departments, and Goals	SH	Against	Against	Against
7	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against

Charter Communications, Inc.

Meeting Date: 02/26/2025Country: USATicker: CHTR

Record Date: 01/13/2025Meeting Type: Special

Primary Security ID: 16119P108

Shares Voted: 41

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Approve Merger Agreement	Mgmt	For	For	For
2	Issue Shares in Connection with Merger	Mgmt	For	For	For
3	Adjourn Meeting	Mgmt	For	For	For

Deere & Company

Meeting Date: 02/26/2025Country: USATicker: DE

Record Date: 12/30/2024Meeting Type: Annual

Primary Security ID: 244199105

Shares Voted: 1,112

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Leanne G. Caret	Mgmt	For	For	For
1b	Elect Director Tamra A. Erwin	Mgmt	For	For	For
1c	Elect Director R. Preston Feight	Mgmt	For	For	For

Deere & Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Alan C. Heuberger	Mgmt	For	For	For
1e	Elect Director L. Neil Hunn	Mgmt	For	For	For
1f	Elect Director Michael O. Johanns	Mgmt	For	For	For
1g	Elect Director John C. May	Mgmt	For	For	For
1h	Elect Director Gregory R. Page	Mgmt	For	For	For
1i	Elect Director Sherry M. Smith	Mgmt	For	For	For
1j	Elect Director Dmitri L. Stockton	Mgmt	For	For	For
1k	Elect Director Sheila G. Talton	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Statistical Differences in Hiring Across Race and Gender	SH	Against	Against	Against
5	Report on Effectiveness of Efforts to Create a Meritocratic Workplace	SH	Against	Against	Against
6	Establish a Board Committee on Corporate Financial Sustainability	SH	Against	Against	Against
7	Report on a Civil Rights Audit	SH	Against	For	For
8	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against

Hologic Inc.

Meeting Date: 02/26/2025

Record Date: 01/06/2025

Primary Security ID: 436440101

Country: USA

Meeting Type: Annual

Ticker: HOLX

Shares Voted: 996

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stephen P. MacMillan	Mgmt	For	For	For
1b	Elect Director Charles J. Dockendorff	Mgmt	For	For	For
1c	Elect Director Ludwig N. Hantson	Mgmt	For	For	For
1d	Elect Director Martin Madaus	Mgmt	For	For	For

Hologic Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Nanaz Mohtashami	Mgmt	For	For	For
1f	Elect Director Christiana Stamoulis	Mgmt	For	For	For
1g	Elect Director Stacey D. Stewart	Mgmt	For	For	For
1h	Elect Director Amy M. Wendell	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Adopt Simple Majority Vote	SH	None	For	For

Nordson Corporation

Meeting Date: 03/04/2025Country: USATicker: NDSN

Record Date: 01/03/2025Meeting Type: Annual

Primary Security ID: 655663102

Shares Voted: 224					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Annette K. Clayton	Mgmt	For	For	For
1.2	Elect Director John A. DeFord	Mgmt	For	For	For
1.3	Elect Director Jennifer A. Parmentier	Mgmt	For	For	For
1.4	Elect Director Victor L. Richey, Jr.	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Fair Isaac Corporation

Meeting Date: 03/05/2025Country: USATicker: FICO

Record Date: 01/06/2025Meeting Type: Annual

Primary Security ID: 303250104

Fair Isaac Corporation

Shares Voted: 107

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Braden R. Kelly	Mgmt	For	For	For
1b	Elect Director Fabiola R. Arredondo	Mgmt	For	For	For
1c	Elect Director William J. Lansing	Mgmt	For	For	For
1d	Elect Director Eva Manolis	Mgmt	For	For	For
1e	Elect Director Marc F. McMorris	Mgmt	For	For	For
1f	Elect Director Joanna Rees	Mgmt	For	For	For
1g	Elect Director David A. Rey	Mgmt	For	For	For
1h	Elect Director H. Tayloe Stansbury	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Applied Materials, Inc.

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

Record Date: 01/08/2025Meeting Type: Annual

Primary Security ID: 038222105

Shares Voted: 3,672

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rani Borkar	Mgmt	For	For	For
1b	Elect Director Judy Bruner	Mgmt	For	For	For
1c	Elect Director Xun (Eric) Chen	Mgmt	For	For	For
1d	Elect Director Aart J. de Geus	Mgmt	For	For	For
1e	Elect Director Gary E. Dickerson	Mgmt	For	For	For
1f	Elect Director Thomas J. Iannotti	Mgmt	For	For	For
1g	Elect Director Alexander A. Karsner	Mgmt	For	For	For
1h	Elect Director Kevin P. March	Mgmt	For	For	For
1i	Elect Director Yvonne McGill	Mgmt	For	For	For
1j	Elect Director Scott A. McGregor	Mgmt	For	For	For

Applied Materials, Inc.

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

Cencora, Inc.

Meeting Date: 03/06/2025

Record Date: 01/10/2025

Primary Security ID: 03073E105

Country: USA

Meeting Type: Annual

Ticker: COR

Shares Voted: 791

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ornella Barra	Mgmt	For	For	For
1b	Elect Director Werner Baumann	Mgmt	For	For	For
1c	Elect Director Frank K. Clyburn	Mgmt	For	For	For
1d	Elect Director Steven H. Collis	Mgmt	For	For	For
1e	Elect Director D. Mark Durcan	Mgmt	For	For	For
1f	Elect Director Lon R. Greenberg	Mgmt	For	For	For
1g	Elect Director Lorence H. Kim	Mgmt	For	For	For
1h	Elect Director Robert P. Mauch	Mgmt	For	For	For
1i	Elect Director Redonda G. Miller	Mgmt	For	For	For
1j	Elect Director Dennis M. Nally	Mgmt	For	For	For
1k	Elect Director Lauren M. Tyler	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

TransDigm Group Incorporated

Meeting Date: 03/06/2025

Record Date: 01/10/2025

Primary Security ID: 893641100

Country: USA

Meeting Type: Annual

Ticker: TDG



TransDigm Group Incorporated

Shares Voted: 244

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director David A. Barr	Mgmt	For	For	For
1.2	Elect Director Jane M. Cronin	Mgmt	For	For	For
1.3	Elect Director Michael Graff	Mgmt	For	For	For
1.4	Elect Director Sean P. Hennessy	Mgmt	For	For	For
1.5	Elect Director W. Nicholas Howley	Mgmt	For	For	For
1.6	Elect Director Gary E. McCullough	Mgmt	For	For	For
1.7	Elect Director Michele L. Santana	Mgmt	For	For	For
1.8	Elect Director Robert J. Small	Mgmt	For	For	For
1.9	Elect Director Kevin M. Stein	Mgmt	For	For	For
1.10	Elect Director Jorge L. Valladares, III	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Toll Brothers, Inc.

Meeting Date: 03/11/2025Country: USATicker: TOL

Record Date: 01/17/2025Meeting Type: Annual

Primary Security ID: 889478103

Shares Voted: 429

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Douglas C. Yearley, Jr.	Mgmt	For	For	For
1.2	Elect Director Stephen F. East	Mgmt	For	For	For
1.3	Elect Director Christine N. Garvey	Mgmt	For	For	For
1.4	Elect Director Karen H. Grimes	Mgmt	For	For	For
1.5	Elect Director Derek T. Kan	Mgmt	For	For	For
1.6	Elect Director John A. McLean	Mgmt	For	For	For
1.7	Elect Director Wendell E. Pritchett	Mgmt	For	For	For

Toll Brothers, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Judith A. Reinsdorf	Mgmt	For	For	For
1.9	Elect Director Katherine M. Sandstrom	Mgmt	For	For	For
1.10	Elect Director Paul E. Shapiro	Mgmt	For	For	For
1.11	Elect Director Scott D. Stowell	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement to Remove Directors	Mgmt	For	For	For

Analog Devices, Inc.

Meeting Date: 03/12/2025

Country: USA

Ticker: ADI

Record Date: 01/03/2025

Meeting Type: Annual

Primary Security ID: 032654105

Shares Voted: 2,198					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vincent Roche	Mgmt	For	For	For
1b	Elect Director Stephen M. Jennings	Mgmt	For	For	For
1c	Elect Director Andre Andonian	Mgmt	For	For	For
1d	Elect Director Edward H. Frank	Mgmt	For	For	For
1e	Elect Director Laurie H. Glimcher	Mgmt	For	For	For
1f	Elect Director Karen M. Golz	Mgmt	For	For	For
1g	Elect Director Peter B. Henry	Mgmt	For	For	For
1h	Elect Director Mercedes Johnson	Mgmt	For	For	For
1i	Elect Director Ray Stata	Mgmt	For	For	For
1j	Elect Director Andrea F. Wainer	Mgmt	For	For	For
1k	Elect Director Susie Wee	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Analog Devices, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Reduce Certain Supermajority Vote Requirement	Mgmt	For	For	For

Johnson Controls International plc

Meeting Date: 03/12/2025Country: IrelandTicker: JCI

Record Date: 01/07/2025Meeting Type: Annual

Primary Security ID: G51502105

Shares Voted: 2,940					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Timothy M. Archer	Mgmt	For	For	For
1b	Elect Director Jean Blackwell	Mgmt	For	For	For
1c	Elect Director Pierre Cohade	Mgmt	For	For	For
1d	Elect Director Patrick K. Decker	Mgmt	For	For	For
1e	Elect Director W. Roy Dunbar	Mgmt	For	For	For
1f	Elect Director Gretchen R. Haggerty	Mgmt	For	For	For
1g	Elect Director Ayesha Khanna	Mgmt	For	For	For
1h	Elect Director Seetarama (Swamy) Kotagiri	Mgmt	For	For	For
1i	Elect Director George R. Oliver	Mgmt	For	For	For
1j	Elect Director Jurgen Tinggren	Mgmt	For	For	For
1k	Elect Director Mark Vergnano	Mgmt	For	For	For
1l	Elect Director John D. Young	Mgmt	For	For	For
2a	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
2b	Authorize Board to Fix Remuneration of Auditors	Mgmt	For	For	For
3	Authorize Market Purchases of Company Shares	Mgmt	For	For	For
4	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For
5	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
6	Approve the Directors' Authority to Allot Shares	Mgmt	For	For	For
7	Approve the Disapplication of Statutory Pre-Emption Rights	Mgmt	For	For	For

# Starbucks Corporation

**Meeting Date:** 03/12/2025

**Country:** USA

**Ticker:** SBUX

**Record Date:** 01/10/2025

**Meeting Type:** Annual

**Primary Security ID:** 855244109

Shares Voted: 4,987

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard E. Allison, Jr.	Mgmt	For	For	For
1b	Elect Director Andrew Campion	Mgmt	For	For	For
1c	Elect Director Beth Ford	Mgmt	For	For	For
1d	Elect Director Jorgen Vig Knudstorp	Mgmt	For	For	For
1e	Elect Director Neal Mohan	Mgmt	For	For	For
1f	Elect Director Brian Niccol	Mgmt	For	For	For
1g	Elect Director Daniel Javier Servitje Montull	Mgmt	For	For	For
1h	Elect Director Michael Sievert	Mgmt	For	For	For
1i	Elect Director Wei Zhang	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against
5	Require Independent Board Chair	SH	Against	Against	Against
6	Report on Human Rights Risks Related to Labor Organizing	SH	Against	Against	Against
7	Report on Cage Free Egg Commitment in China and Japan	SH	Against	Against	Against
8	Publish an Annual Carbon Emissions Congruency Report	SH	Against	Against	Against

# TE Connectivity Plc

**Meeting Date:** 03/12/2025

**Country:** Ireland

**Ticker:** TEL

**Record Date:** 01/13/2025

**Meeting Type:** Annual

**Primary Security ID:** G87052109

Shares Voted: 1,366

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jean-Pierre Clamadieu	Mgmt	For	For	For
1b	Elect Director Terrence R. Curtin	Mgmt	For	For	For
1c	Elect Director Carol A. (John) Davidson	Mgmt	For	For	For
1d	Elect Director Lynn A. Dugle	Mgmt	For	For	For
1e	Elect Director Sam Eldessouky	Mgmt	For	For	For
1f	Elect Director William A. Jeffrey	Mgmt	For	For	For
1g	Elect Director Syaru Shirley Lin	Mgmt	For	For	For
1h	Elect Director Heath A. Mitts	Mgmt	For	For	For
1i	Elect Director Abhjit Y. Talwalkar	Mgmt	For	For	For
1j	Elect Director Mark C. Trudeau	Mgmt	For	For	For
1k	Elect Director Dawn C. Willoughby	Mgmt	For	For	For
1l	Elect Director Laura H. Wright	Mgmt	For	For	For
2	Approve Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Authorize Share Repurchase Program	Mgmt	For	For	For
5	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For

Agilent Technologies, Inc.

Meeting Date: 03/13/2025Country: USATicker: A

Record Date: 01/23/2025Meeting Type: Annual

Primary Security ID: 00846U101

Shares Voted: 1,315

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Otis W. Brawley	Mgmt	For	For	For
1.2	Elect Director Mikael Dolsten	Mgmt	For	For	For

Agilent Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Declassify the Board of Directors	SH	None	For	For

QUALCOMM Incorporated

Meeting Date: 03/18/2025Country: USATicker: QCOM

Record Date: 01/17/2025Meeting Type: Annual

Primary Security ID: 747525103

Shares Voted: 5,057

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sylvia Acevedo	Mgmt	For	For	For
1b	Elect Director Cristiano R. Amon	Mgmt	For	For	For
1c	Elect Director Mark Fields	Mgmt	For	For	For
1d	Elect Director Jeffrey W. Henderson	Mgmt	For	For	For
1e	Elect Director Ann M. Livermore	Mgmt	For	For	For
1f	Elect Director Mark D. McLaughlin	Mgmt	For	For	For
1g	Elect Director Jamie S. Miller	Mgmt	For	For	For
1h	Elect Director Marie Myers	Mgmt	For	For	For
1i	Elect Director Irene B. Rosenfeld	Mgmt	For	For	For
1j	Elect Director Kornelis (Neil) Smit	Mgmt	For	For	For
1k	Elect Director Jean-Pascal Tricoire	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Climate Risk in Retirement Plan Options	SH	Against	Against	Against

Keysight Technologies, Inc.

Meeting Date: 03/20/2025

Record Date: 01/22/2025

Primary Security ID: 49338L103

Country: USA

Meeting Type: Annual

Ticker: KEYS

Shares Voted: 768

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director James G. Cullen	Mgmt	For	For	For
1.2	Elect Director Michelle J. Holthaus	Mgmt	For	For	For
1.3	Elect Director Jean M. Nye	Mgmt	For	For	For
1.4	Elect Director Joanne B. Olsen	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Declassify the Board of Directors	SH	Against	For	For

The Walt Disney Company

Meeting Date: 03/20/2025

Record Date: 01/21/2025

Primary Security ID: 254687106

Country: USA

Meeting Type: Annual

Ticker: DIS

Shares Voted: 8,244

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mary T. Barra	Mgmt	For	For	For
1b	Elect Director Amy L. Chang	Mgmt	For	For	For
1c	Elect Director D. Jeremy Darroch	Mgmt	For	For	For
1d	Elect Director Carolyn N. Everson	Mgmt	For	For	For
1e	Elect Director Michael B.G. Froman	Mgmt	For	For	For
1f	Elect Director James P. Gorman	Mgmt	For	For	For
1g	Elect Director Robert A. Iger	Mgmt	For	For	For
1h	Elect Director Maria Elena Lagomasino	Mgmt	For	For	For
1i	Elect Director Calvin R. McDonald	Mgmt	For	For	For
1j	Elect Director Derica W. Rice	Mgmt	For	For	For

## The Walt Disney Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Climate Risk in Retirement Plan Options	SH	Against	Against	Against
5	Reconsider Participation in Human Rights Campaign's Corporate Equality Index	SH	Against	Against	Against
6	Report on Risks of Discriminating Based on Religious and Political Views	SH	Against	Against	Against

## Hewlett Packard Enterprise Company

Meeting Date: 04/02/2025Country: USATicker: HPE

Record Date: 02/03/2025Meeting Type: Annual

Primary Security ID: 42824C109

Shares Voted: 5,840

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Pamela L. Carter	Mgmt	For	For	For
1b	Elect Director Frank A. D'Amelio	Mgmt	For	For	For
1c	Elect Director Regina E. Dugan	Mgmt	For	For	For
1d	Elect Director Jean M. Hobby	Mgmt	For	For	For
1e	Elect Director Raymond J. Lane	Mgmt	For	For	For
1f	Elect Director Ann M. Livermore	Mgmt	For	For	For
1g	Elect Director Bethany J. Mayer	Mgmt	For	For	For
1h	Elect Director Antonio F. Neri	Mgmt	For	For	For
1i	Elect Director Charles H. Noski	Mgmt	For	For	For
1j	Elect Director Raymond E. Ozzie	Mgmt	For	For	For
1k	Elect Director Gary M. Reiner	Mgmt	For	For	For
1l	Elect Director Patricia F. Russo	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For



## Hewlett Packard Enterprise Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
6	Report on Lobbying Payments and Policy	SH	Against	Against	Against

## Schlumberger N.V.

Meeting Date: 04/02/2025Country: CuracaoTicker: SLB

Record Date: 02/05/2025Meeting Type: Annual

Primary Security ID: 806857108

Shares Voted: 6,484					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peter Coleman	Mgmt	For	For	For
1.2	Elect Director Patrick de La Chevardiére	Mgmt	For	For	For
1.3	Elect Director Miguel Galuccio	Mgmt	For	For	For
1.4	Elect Director Jim Hackett	Mgmt	For	For	For
1.5	Elect Director Olivier Le Peuch	Mgmt	For	For	For
1.6	Elect Director Samuel Leupold	Mgmt	For	For	For
1.7	Elect Director Maria Moraeus Hanssen	Mgmt	For	For	For
1.8	Elect Director Vanitha Narayanan	Mgmt	For	For	For
1.9	Elect Director Jeff Sheets	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Adopt and Approve Financials and Dividends	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

## The Cooper Companies, Inc.

Meeting Date: 04/02/2025Country: USATicker: COO

Record Date: 02/07/2025Meeting Type: Annual

Primary Security ID: 216648501

The Cooper Companies, Inc.

Shares Voted: 909

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert S. Weiss	Mgmt	For	For	For
1b	Elect Director Colleen E. Jay	Mgmt	For	For	For
1c	Elect Director Lawrence E. Kurzius	Mgmt	For	For	For
1d	Elect Director Cynthia L. Lucchese	Mgmt	For	For	For
1e	Elect Director Teresa S. Madden	Mgmt	For	For	For
1f	Elect Director Maria Rivas	Mgmt	For	For	For
1g	Elect Director Albert G. White, III	Mgmt	For	For	For
2	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Carrier Global Corporation

Meeting Date: 04/09/2025Country: USATicker: CARR

Record Date: 02/13/2025Meeting Type: Annual

Primary Security ID: 14448C104

Shares Voted: 3,961

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jean-Pierre Garnier	Mgmt	For	For	For
1b	Elect Director David L. Gitlin	Mgmt	For	For	For
1c	Elect Director John J. Greisch	Mgmt	For	For	For
1d	Elect Director Charles M. Holley, Jr.	Mgmt	For	For	For
1e	Elect Director Michael M. McNamara	Mgmt	For	For	For
1f	Elect Director Amy E. Miles	Mgmt	For	For	For
1g	Elect Director Susan N. Story	Mgmt	For	For	For
1h	Elect Director Michael A. Todman	Mgmt	For	For	For
1i	Elect Director Maximilian (Max) Viessmann	Mgmt	For	For	For

## Carrier Global Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Virginia M. Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Report on Lobbying Payments and Policy	SH	Against	Against	Against

## Lennar Corporation

Meeting Date: 04/09/2025	Country: USA	Ticker: LEN
Record Date: 02/12/2025	Meeting Type: Annual	
Primary Security ID: 526057104		

Shares Voted: 1,076

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Amy Banse	Mgmt	For	For	For
1b	Elect Director Theron (Tig) Gilliam	Mgmt	For	For	For
1c	Elect Director Sherrill W. Hudson	Mgmt	For	For	For
1d	Elect Director Jonathan M. Jaffe	Mgmt	For	For	For
1e	Elect Director Teri P. McClure	Mgmt	For	For	For
1f	Elect Director Stuart Miller	Mgmt	For	Against	Against
1g	Elect Director Armando Olivera	Mgmt	For	For	For
1h	Elect Director Dacona Smith	Mgmt	For	For	For
1i	Elect Director Jeffrey Sonnenfeld	Mgmt	For	Against	Against
1j	Elect Director Serena Wolfe	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For
5	Disclose GHG Emissions Reductions Targets for Full Value Chain	SH	Against	Against	Against

Lennar Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Report on Diversity Equity and Inclusion Efforts	SH	Against	Against	Against

Dow Inc.

Meeting Date: 04/10/2025	Country: USA	Ticker: DOW
Record Date: 02/14/2025	Meeting Type: Annual	
Primary Security ID: 260557103		

Shares Voted: 3,330

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Samuel R. Allen	Mgmt	For	For	For
1b	Elect Director Gaurdie E. Banister, Jr.	Mgmt	For	For	For
1c	Elect Director Wesley G. Bush	Mgmt	For	For	For
1d	Elect Director Richard K. Davis	Mgmt	For	For	For
1e	Elect Director Jerri DeVard	Mgmt	For	For	For
1f	Elect Director Debra L. Dial	Mgmt	For	For	For
1g	Elect Director Jeff M. Fettig	Mgmt	For	For	For
1h	Elect Director Jim Fitterling	Mgmt	For	For	For
1i	Elect Director Jacqueline C. Hinman	Mgmt	For	For	For
1j	Elect Director Rebecca B. Liebert	Mgmt	For	For	For
1k	Elect Director Luis Alberto Moreno	Mgmt	For	For	For
1l	Elect Director Jill S. Wyant	Mgmt	For	For	For
1m	Elect Director Daniel W. Yohannes	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Synopsys, Inc.

Meeting Date: 04/10/2025	Country: USA	Ticker: SNPS
Record Date: 02/10/2025	Meeting Type: Annual	
Primary Security ID: 871607107		

Shares Voted: 709

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Aart J. de Geus	Mgmt	For	For	For
1b	Elect Director John G. Schwarz	Mgmt	For	For	For
1c	Elect Director Sassine Ghazi	Mgmt	For	For	For
1d	Elect Director Luis Borgen	Mgmt	For	For	For
1e	Elect Director Janice D. Chaffin	Mgmt	For	For	For
1f	Elect Director Bruce R. Chizen	Mgmt	For	For	For
1g	Elect Director Mercedes Johnson	Mgmt	For	For	For
1h	Elect Director Robert G. Painter	Mgmt	For	For	For
1i	Elect Director Jeannine P. Sargent	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
6	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

HP Inc.

Meeting Date: 04/14/2025Country: USATicker: HPQ

Record Date: 02/20/2025Meeting Type: Annual

Primary Security ID: 40434L105

Shares Voted: 4,414

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Chip Bergh	Mgmt	For	For	For
1b	Elect Director Bruce Broussard	Mgmt	For	For	For
1c	Elect Director Stacy Brown-Philpot	Mgmt	For	For	For
1d	Elect Director Stephanie A. Burns	Mgmt	For	For	For
1e	Elect Director Mary Anne Citrino	Mgmt	For	For	For
1f	Elect Director Richard L. Clemmer	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Fama Francisco	Mgmt	For	For	For
1h	Elect Director Enrique J. Lores	Mgmt	For	For	For
1i	Elect Director David Meline	Mgmt	For	For	For
1j	Elect Director Judith "Jami" Miscik	Mgmt	For	For	For
1k	Elect Director Gianluca Pettiti	Mgmt	For	For	For
1l	Elect Director Kim K.W. Rucker	Mgmt	For	For	For
1m	Elect Director Songyee Yoon	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Fifth Third Bancorp

Meeting Date: 04/15/2025

Record Date: 02/21/2025

Primary Security ID: 316773100

Country: USA

Meeting Type: Annual

Ticker: FITB

Shares Voted: 3,163					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicholas K. Akins	Mgmt	For	For	For
1b	Elect Director B. Evan Bayh, III	Mgmt	For	For	For
1c	Elect Director Jorge L. Benitez	Mgmt	For	For	For
1d	Elect Director Katherine B. Blackburn	Mgmt	For	For	For
1e	Elect Director Linda W. Clement-Holmes	Mgmt	For	For	For
1f	Elect Director C. Bryan Daniels	Mgmt	For	For	For
1g	Elect Director Laurent Desmangles	Mgmt	For	For	For
1h	Elect Director Mitchell S. Feiger	Mgmt	For	For	For
1i	Elect Director Thomas H. Harvey	Mgmt	For	For	For
1j	Elect Director Gary R. Heminger	Mgmt	For	For	For
1k	Elect Director Eileen A. Mallesch	Mgmt	For	For	For
1l	Elect Director Kathleen A. Rogers	Mgmt	For	For	For

Fifth Third Bancorp

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1m	Elect Director Timothy N. Spence	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

M&T Bank Corporation

Meeting Date: 04/15/2025Country: USATicker: MTB

Record Date: 02/20/2025Meeting Type: Annual

Primary Security ID: 55261F104

Shares Voted: 778					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John P. Barnes	Mgmt	For	For	For
1.2	Elect Director Carlton J. Charles	Mgmt	For	For	For
1.3	Elect Director Jane Chwick	Mgmt	For	For	For
1.4	Elect Director William F. Cruger, Jr.	Mgmt	For	For	For
1.5	Elect Director Gary N. Geisel	Mgmt	For	For	For
1.6	Elect Director Leslie V. Godridge	Mgmt	For	For	For
1.7	Elect Director Rene F. Jones	Mgmt	For	For	For
1.8	Elect Director Richard H. Ledgett, Jr.	Mgmt	For	For	For
1.9	Elect Director Melinda R. Rich	Mgmt	For	For	For
1.10	Elect Director Robert E. Sadler, Jr.	Mgmt	For	For	For
1.11	Elect Director Denis J. Salamone	Mgmt	For	For	For
1.12	Elect Director Rudina Seleri	Mgmt	For	For	For
1.13	Elect Director Kirk W. Walters	Mgmt	For	For	For
1.14	Elect Director Herbert L. Washington	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

# Moody's Corporation

**Meeting Date:** 04/15/2025

**Country:** USA

**Ticker:** MCO

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

**Meeting Type:** Annual

**Primary Security ID:** 615369105

Shares Voted: 732

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jorge A. Bermudez	Mgmt	For	For	For
1b	Elect Director Therese Esperdy	Mgmt	For	For	For
1c	Elect Director Robert Fauber	Mgmt	For	For	For
1d	Elect Director Vincent A. Forlenza	Mgmt	For	For	For
1e	Elect Director Lloyd W. Howell, Jr.	Mgmt	For	For	For
1f	Elect Director Jose M. Minaya	Mgmt	For	For	For
1g	Elect Director Leslie F. Seidman	Mgmt	For	For	For
1h	Elect Director Zig Serafin	Mgmt	For	For	For
1i	Elect Director Bruce Van Saun	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

# Owens Corning

**Meeting Date:** 04/15/2025

**Country:** USA

**Ticker:** OC

**Record Date:** 02/18/2025

**Meeting Type:** Annual

**Primary Security ID:** 690742101

Shares Voted: 396

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Brian D. Chambers	Mgmt	For	For	For
1b	Elect Director Michelle T. Collins	Mgmt	For	For	For
1c	Elect Director Eduardo E. Cordeiro	Mgmt	For	For	For
1d	Elect Director Adrienne D. Elsner	Mgmt	For	For	For
1e	Elect Director Alfred E. Festa	Mgmt	For	For	For



Owens Corning

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Edward F. Lonergan	Mgmt	For	For	For
1g	Elect Director Maryann T. Mannen	Mgmt	For	For	For
1h	Elect Director Paul E. Martin	Mgmt	For	For	For
1i	Elect Director Suzanne P. Nimocks	Mgmt	For	For	For
1j	Elect Director John D. Williams	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

The Bank of New York Mellon Corporation

Meeting Date: 04/15/2025Country: USATicker: BK

Record Date: 02/19/2025Meeting Type: Annual

Primary Security ID: 064058100

Shares Voted: 3,393

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Linda Z. Cook	Mgmt	For	For	For
1b	Elect Director Joseph J. Echevarria	Mgmt	For	For	For
1c	Elect Director M. Amy Gilliland	Mgmt	For	For	For
1d	Elect Director Jeffrey A. Goldstein	Mgmt	For	For	For
1e	Elect Director K. Guru Gowrappan	Mgmt	For	For	For
1f	Elect Director Ralph Izzo	Mgmt	For	For	For
1g	Elect Director Sandie O'Connor	Mgmt	For	For	For
1h	Elect Director Elizabeth E. Robinson	Mgmt	For	For	For
1i	Elect Director Rakefet Russak-Aminoach	Mgmt	For	For	For
1j	Elect Director Robin A. Vince	Mgmt	For	For	For
1k	Elect Director Alfred W. "Al" Zollar	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

U.S. Bancorp

Meeting Date: 04/15/2025

Record Date: 02/18/2025

Primary Security ID: 902973304

Country: USA

Meeting Type: Annual

Ticker: USB

Shares Voted: 7,045

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Warner L. Baxter	Mgmt	For	For	For
1b	Elect Director Dorothy Bridges	Mgmt	For	For	For
1c	Elect Director Elizabeth L. Buse	Mgmt	For	For	For
1d	Elect Director Andrew Cecere	Mgmt	For	For	For
1e	Elect Director Alan B. Colberg	Mgmt	For	For	For
1f	Elect Director Kimberly N. Ellison-Taylor	Mgmt	For	For	For
1g	Elect Director Aleem Gillani	Mgmt	For	For	For
1h	Elect Director Kimberly J. Harris *Withdrawn Resolution*	Mgmt			
1i	Elect Director Roland A. Hernandez	Mgmt	For	For	For
1j	Elect Director Gunjan Kedia	Mgmt	For	For	For
1k	Elect Director Richard P. McKenney	Mgmt	For	For	For
1l	Elect Director Yusuf I. Mehdi	Mgmt	For	For	For
1m	Elect Director Loretta E. Reynolds	Mgmt	For	For	For
1n	Elect Director John P. Wiehoff	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

Carnival Corporation

Meeting Date: 04/16/2025

Record Date: 02/18/2025

Primary Security ID: 143658300

Country: Panama

Meeting Type: Annual

Ticker: CCL

Shares Voted: 4,617

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Re-elect Micky Arison as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
2	Re-elect Jonathon Band as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
3	Re-elect Jason Glen Cahilly as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
4	Elect Nelda J. Connors as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
5	Re-elect Helen Deeble as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
6	Re-elect Jeffrey J. Gearhart as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
7	Re-elect Katie Lahey as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
8	Re-elect Stuart Subotnick as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
9	Re-elect Laura Weil as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
10	Re-elect Josh Weinstein as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
11	Re-elect Randy Weisenburger as a Director of Carnival Corporation and as a Director of Carnival plc	Mgmt	For	For	For
12	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
13	Approve Directors' Remuneration Report (in Accordance with Legal Requirements Applicable to UK Companies)	Mgmt	For	For	For

Carnival Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
14	Approve Directors' Remuneration Policy (in Accordance with Legal Requirements Applicable to UK Companies)	Mgmt	For	For	For
15	Appoint Deloitte LLP as Independent Auditors of Carnival plc; Ratify the Selection of the U.S. Firm of Deloitte & Touche LLP as the Independent Registered Public Accounting Firm of Carnival Corporation	Mgmt	For	For	For
16	Authorize Board to Fix Remuneration of Auditors	Mgmt	For	For	For
17	Receive the Accounts and Reports of the Directors and Auditors of Carnival plc for the Year Ended November 30, 2024 (in Accordance with Legal Requirements Applicable to UK Companies)	Mgmt	For	For	For
18	Approve Issuance of Equity	Mgmt	For	For	For
19	Approve Issuance of Equity or Equity-Linked Securities without Preemptive Rights	Mgmt	For	For	For
20	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

CenterPoint Energy, Inc.

Meeting Date: 04/16/2025Country: USATicker: CNP

Record Date: 02/18/2025Meeting Type: Annual

Primary Security ID: 15189T107

Shares Voted: 3,002

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wendy Montoya Cloonan	Mgmt	For	For	For
1b	Elect Director Barbara J. Duganier	Mgmt	For	For	For
1c	Elect Director Laurie L. Fitch	Mgmt	For	For	For
1d	Elect Director Christopher H. Franklin	Mgmt	For	For	For
1e	Elect Director Raquelle W. Lewis	Mgmt	For	For	For
1f	Elect Director Thaddeus J. Malik	Mgmt	For	For	For

CenterPoint Energy, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Manuel B. Miranda	Mgmt	For	For	For
1h	Elect Director Theodore F. Pound	Mgmt	For	For	For
1i	Elect Director Dean L. Seavers	Mgmt	For	For	For
1j	Elect Director Phillip R. Smith	Mgmt	For	For	For
1k	Elect Director Jason P. Wells	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Non-Employee Director Stock Plan	Mgmt	For	For	For

EQT Corporation

Meeting Date: 04/16/2025

Record Date: 02/03/2025

Primary Security ID: 26884L109

Country: USA

Meeting Type: Annual

Ticker: EQT

Shares Voted: 2,565

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vicky A. Bailey	Mgmt	For	For	For
1b	Elect Director Lee M. Canaan	Mgmt	For	For	For
1c	Elect Director Frank C. Hu	Mgmt	For	For	For
1d	Elect Director Kathryn J. Jackson	Mgmt	For	For	For
1e	Elect Director Thomas F. Karam	Mgmt	For	For	For
1f	Elect Director John F. McCartney	Mgmt	For	For	For
1g	Elect Director Daniel J. Rice, IV	Mgmt	For	For	For
1h	Elect Director Toby Z. Rice	Mgmt	For	For	For
1i	Elect Director Robert F. Vagt	Mgmt	For	For	For
1j	Elect Director Hallie A. Vanderhider	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For

## EQT Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Approve Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## Huntington Bancshares Incorporated

Meeting Date: 04/16/2025Country: USATicker: HBAN

Record Date: 02/18/2025Meeting Type: Annual

Primary Security ID: 446150104

Shares Voted: 6,650

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ann B. (Tanny) Crane	Mgmt	For	For	For
1.2	Elect Director Rafael Andres Diaz-Granados	Mgmt	For	For	For
1.3	Elect Director John C. (Chris) Inglis	Mgmt	For	For	For
1.4	Elect Director Katherine M. A. (Allie) Kline	Mgmt	For	For	For
1.5	Elect Director Richard W. Neu	Mgmt	For	For	For
1.6	Elect Director Kenneth J. Phelan	Mgmt	For	For	For
1.7	Elect Director David L. Porteous	Mgmt	For	For	For
1.8	Elect Director Teresa H. Shea	Mgmt	For	For	For
1.9	Elect Director Roger J. Sit	Mgmt	For	For	For
1.10	Elect Director Stephen D. Steinour	Mgmt	For	For	For
1.11	Elect Director Jeffrey L. Tate	Mgmt	For	For	For
1.12	Elect Director Gary Torgow	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Regions Financial Corporation

Meeting Date: 04/16/2025Country: USATicker: RF

Record Date: 02/18/2025Meeting Type: Annual

Primary Security ID: 7591EP100

Regions Financial Corporation

Shares Voted: 4,308

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Crosswhite	Mgmt	For	For	For
1b	Elect Director Noopur Davis	Mgmt	For	For	For
1c	Elect Director Zhanna Golodryga	Mgmt	For	For	For
1d	Elect Director J. Thomas Hill	Mgmt	For	For	For
1e	Elect Director Roger W. Jenkins	Mgmt	For	For	For
1f	Elect Director Joia M. Johnson	Mgmt	For	For	For
1g	Elect Director Ruth Ann Marshall	Mgmt	For	For	For
1h	Elect Director James T. Prokopanko	Mgmt	For	For	For
1i	Elect Director Alison S. Rand	Mgmt	For	For	For
1j	Elect Director William C. Rhodes, III	Mgmt	For	For	For
1k	Elect Director Lee J. Styslinger, III	Mgmt	For	For	For
1l	Elect Director Jose S. Suquet	Mgmt	For	For	For
1m	Elect Director John M. Turner, Jr.	Mgmt	For	For	For
1n	Elect Director Timothy Vines	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Adopt Simple Majority Vote	SH	None	For	For

The Sherwin-Williams Company

Meeting Date: 04/16/2025Country: USATicker: SHW

Record Date: 02/19/2025Meeting Type: Annual

Primary Security ID: 824348106

Shares Voted: 1,095

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kerrii B. Anderson	Mgmt	For	For	For
1b	Elect Director Jeff M. Fetting	Mgmt	For	For	For

The Sherwin-Williams Company

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

Humana Inc.

Meeting Date: 04/17/2025Country: USATicker: HUM

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 444859102

Shares Voted: 575

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Raquel C. Bono	Mgmt	For	For	For
1b	Elect Director Frank A. D'Amelio	Mgmt	For	For	For
1c	Elect Director David T. Feinberg	Mgmt	For	For	For
1d	Elect Director Wayne A. I. Frederick	Mgmt	For	For	For
1e	Elect Director John W. Garratt	Mgmt	For	For	For
1f	Elect Director Kurt J. Hilzinger	Mgmt	For	For	For
1g	Elect Director Karen W. Katz	Mgmt	For	For	For
1h	Elect Director Marcy S. Klevorn	Mgmt	For	For	For



Humana Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Jorge S. Mesquita	Mgmt	For	For	For
1j	Elect Director James A. Rehtin	Mgmt	For	For	For
1k	Elect Director Gordon Smith	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Interactive Brokers Group, Inc.

Meeting Date: 04/17/2025Country: USATicker: IBKR

Record Date: 02/19/2025Meeting Type: Annual

Primary Security ID: 45841N107

Shares Voted: 479					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas Peterffy	Mgmt	For	Against	Against
1b	Elect Director Earl H. Nemser	Mgmt	For	Against	Against
1c	Elect Director Milan Galik	Mgmt	For	Against	Against
1d	Elect Director Paul J. Brody	Mgmt	For	Against	Against
1e	Elect Director Lawrence E. Harris	Mgmt	For	For	For
1f	Elect Director William Peterffy	Mgmt	For	Against	Against
1g	Elect Director Nicole Yuen	Mgmt	For	For	For
1h	Elect Director Jill Bright	Mgmt	For	For	For
1i	Elect Director Richard Repetto	Mgmt	For	For	For
1j	Elect Director Lori Conkling	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

PPG Industries, Inc.

Meeting Date: 04/17/2025Country: USATicker: PPG

Record Date: 02/21/2025Meeting Type: Annual

Primary Security ID: 693506107

Shares Voted: 1,096

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kathy L. Fortmann	Mgmt	For	For	For
1b	Elect Director Melanie L. Healey	Mgmt	For	For	For
1c	Elect Director Gary R. Heminger	Mgmt	For	For	For
1d	Elect Director Timothy M. Knavish	Mgmt	For	For	For
1e	Elect Director Michael W. Lamach	Mgmt	For	For	For
1f	Elect Director Kathleen A. Ligocki	Mgmt	For	For	For
1g	Elect Director Michael T. Nally	Mgmt	For	For	For
1h	Elect Director Guillermo Novo	Mgmt	For	For	For
1i	Elect Director Christopher N. Roberts, III	Mgmt	For	For	For
1j	Elect Director Catherine R. Smith	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

Texas Instruments Incorporated

Meeting Date: 04/17/2025Country: USATicker: TXN

Record Date: 02/20/2025Meeting Type: Annual

Primary Security ID: 882508104

Shares Voted: 4,290

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark Blinn	Mgmt	For	For	For
1b	Elect Director Todd Bluedorn	Mgmt	For	For	For
1c	Elect Director Janet Clark	Mgmt	For	For	For
1d	Elect Director Carrie Cox	Mgmt	For	For	For
1e	Elect Director Martin Craighead	Mgmt	For	For	For
1f	Elect Director Reginald DesRoches	Mgmt	For	For	For

Texas Instruments Incorporated

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

L3Harris Technologies, Inc.

Meeting Date: 04/18/2025Country: USATicker: LHX

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 502431109

Shares Voted: 896

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sallie B. Bailey	Mgmt	For	For	For
1b	Elect Director Thomas A. Dattilo	Mgmt	For	For	For
1c	Elect Director Roger B. Fradin	Mgmt	For	For	For
1d	Elect Director Joanna L. Geraghty	Mgmt	For	For	For
1e	Elect Director Kirk S. Hachigian	Mgmt	For	For	For
1f	Elect Director Harry B. Harris, Jr.	Mgmt	For	For	For
1g	Elect Director Lewis Hay, III	Mgmt	For	For	For
1h	Elect Director Christopher E. Kubasik	Mgmt	For	For	For
1i	Elect Director Rita S. Lane	Mgmt	For	For	For
1j	Elect Director Robert B. Millard	Mgmt	For	For	For
1k	Elect Director David S. Regnery	Mgmt	For	For	For

L3Harris Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Edward A. Rice, Jr.	Mgmt	For	For	For
1m	Elect Director Christina L. Zamarro	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	Against	Against

Broadcom Inc.

Meeting Date: 04/21/2025Country: USATicker: AVGO

Record Date: 02/21/2025Meeting Type: Annual

Primary Security ID: 11135F101

Shares Voted: 21,869

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Diane M. Bryant	Mgmt	For	For	For
1b	Elect Director Gayla J. Delly	Mgmt	For	For	For
1c	Elect Director Kenneth Y. Hao	Mgmt	For	For	For
1d	Elect Director Eddy W. Hartenstein	Mgmt	For	For	For
1e	Elect Director Check Kian Low	Mgmt	For	For	For
1f	Elect Director Justine F. Page	Mgmt	For	For	For
1g	Elect Director Henry Samueli	Mgmt	For	For	For
1h	Elect Director Hock E. Tan	Mgmt	For	For	For
1i	Elect Director Harry L. You	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Adobe Inc.

Meeting Date: 04/22/2025Country: USATicker: ADBE

Record Date: 02/21/2025Meeting Type: Annual

Primary Security ID: 00724F101

Shares Voted: 2,068

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cristiano Amon	Mgmt	For	For	For
1b	Elect Director Amy Banse	Mgmt	For	For	For
1c	Elect Director Melanie Boulden	Mgmt	For	For	For
1d	Elect Director Frank Calderoni	Mgmt	For	For	For
1e	Elect Director Laura Desmond	Mgmt	For	For	For
1f	Elect Director Shantanu Narayen	Mgmt	For	For	For
1g	Elect Director Spencer Neumann	Mgmt	For	For	For
1h	Elect Director Kathleen Oberg	Mgmt	For	For	For
1i	Elect Director Dheeraj Pandey	Mgmt	For	For	For
1j	Elect Director David Ricks	Mgmt	For	For	For
1k	Elect Director Daniel Rosensweig	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Bank of America Corporation

Meeting Date: 04/22/2025Country: USATicker: BAC

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

Primary Security ID: 060505104

Shares Voted: 31,587

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sharon L. Allen	Mgmt	For	For	For
1b	Elect Director Jose (Joe) E. Almeida	Mgmt	For	For	For
1c	Elect Director Pierre J.P. de Weck	Mgmt	For	For	For
1d	Elect Director Arnold W. Donald	Mgmt	For	For	For
1e	Elect Director Linda P. Hudson	Mgmt	For	For	For

Bank of America Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Monica C. Lozano	Mgmt	For	For	For
1g	Elect Director Maria N. Martinez	Mgmt	For	For	For
1h	Elect Director Brian T. Moynihan	Mgmt	For	For	For
1i	Elect Director Lionel L. Nowell, III	Mgmt	For	For	For
1j	Elect Director Denise L. Ramos	Mgmt	For	For	For
1k	Elect Director Clayton S. Rose	Mgmt	For	For	For
1l	Elect Director Michael D. White	Mgmt	For	For	For
1m	Elect Director Thomas D. Woods	Mgmt	For	For	For
1n	Elect Director Maria T. Zuber	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Require More Director Nominations Than Open Seats	SH	Against	Against	Against
6	Report on Board Oversight of Material Risks Related to Animal Welfare	SH	Against	Against	Against
7	Report on Climate Lobbying	SH	Against	Against	Against
8	Report on Clean Energy Supply Financing Ratio	SH	Against	Against	Against

Charter Communications, Inc.

Meeting Date: 04/22/2025	Country: USA	Ticker: CHTR
Record Date: 02/21/2025	Meeting Type: Annual	
Primary Security ID: 16119P108		

Shares Voted: 3					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eric L. Zinterhofer	Mgmt	For	For	For
1b	Elect Director W. Lance Conn	Mgmt	For	For	For
1c	Elect Director Kim C. Goodman	Mgmt	For	For	For
1d	Elect Director John D. Markley, Jr.	Mgmt	For	For	For

Charter Communications, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director David C. Merritt	Mgmt	For	For	For
1f	Elect Director Steven A. Miron	Mgmt	For	For	For
1g	Elect Director Balan Nair	Mgmt	For	For	For
1h	Elect Director Michael A. Newhouse	Mgmt	For	For	For
1i	Elect Director Martin E. Patterson	Mgmt	For	For	For
1j	Elect Director Mauricio Ramos	Mgmt	For	For	For
1k	Elect Director Carolyn J. Slaski	Mgmt	For	For	For
1l	Elect Director J. David Wargo	Mgmt	For	For	For
1m	Elect Director Christopher L. Winfrey	Mgmt	For	For	For
2	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Report on Political Contributions	SH	Against	For	For

MSCI Inc.

Meeting Date: 04/22/2025

Record Date: 02/28/2025

Primary Security ID: 55354G100

Country: USA

Meeting Type: Annual

Ticker: MSCI

Shares Voted: 358					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert G. Ashe	Mgmt	For	For	For
1b	Elect Director Henry A. Fernandez	Mgmt	For	For	For
1c	Elect Director Robin L. Matlock	Mgmt	For	For	For
1d	Elect Director Jacques P. Perold	Mgmt	For	For	For
1e	Elect Director C.D. Baer Pettit	Mgmt	For	For	For
1f	Elect Director Sandy C. Rattray	Mgmt	For	For	For
1g	Elect Director Linda H. Riefler	Mgmt	For	For	For
1h	Elect Director Michelle Seitz	Mgmt	For	For	For
1i	Elect Director Marcus L. Smith	Mgmt	For	For	For
1j	Elect Director Rajat Taneja	Mgmt	For	For	For
1k	Elect Director Paula Volent	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director June Yang	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Northern Trust Corporation

Meeting Date: 04/22/2025Country: USATicker: NTRS

Record Date: 02/24/2025Meeting Type: Annual

Primary Security ID: 665859104

Shares Voted: 938					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan Crown	Mgmt	For	For	For
1b	Elect Director Chandra Dhandapani	Mgmt	For	For	For
1c	Elect Director Dean M. Harrison	Mgmt	For	For	For
1d	Elect Director Jay L. Henderson	Mgmt	For	For	For
1e	Elect Director Marcy S. Klevorn	Mgmt	For	For	For
1f	Elect Director Siddharth N. "Bobby" Mehta	Mgmt	For	For	For
1g	Elect Director Robert E. Moritz	Mgmt	For	For	For
1h	Elect Director Michael G. O'Grady	Mgmt	For	For	For
1i	Elect Director Richard M. Petrino	Mgmt	For	For	For
1j	Elect Director Martin P. Slark	Mgmt	For	For	For
1k	Elect Director David H. B. Smith, Jr.	Mgmt	For	For	For
1l	Elect Director Donald Thompson	Mgmt	For	For	For
1m	Elect Director Charles A. Tribbett, III	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For



Public Service Enterprise Group Incorporated

Meeting Date: 04/22/2025

Record Date: 02/21/2025

Primary Security ID: 744573106

Country: USA

Meeting Type: Annual

Ticker: PEG

Shares Voted: 2,367

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ralph A. LaRossa	Mgmt	For	For	For
1b	Elect Director Susan Tomasky	Mgmt	For	For	For
1c	Elect Director Willie A. Deese	Mgmt	For	For	For
1d	Elect Director Jamie M. Gentoso	Mgmt	For	For	For
1e	Elect Director Barry H. Ostrowsky	Mgmt	For	For	For
1f	Elect Director Ricardo G. Pérez	Mgmt	For	For	For
1g	Elect Director Valerie A. Smith	Mgmt	For	For	For
1h	Elect Director Scott G. Stephenson	Mgmt	For	For	For
1i	Elect Director Laura A. Sugg	Mgmt	For	For	For
1j	Elect Director John P. Surma	Mgmt	For	For	For
1k	Elect Director Kenneth Y. Tanji	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3a	Eliminate Supermajority Vote Requirement for Certain Business Combinations	Mgmt	For	For	For
3b	Eliminate Supermajority Vote Requirements to Remove a Director Without Cause	Mgmt	For	For	For
3c	Eliminate Supermajority Vote Requirement to Make Certain Amendments to Our By-Laws	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Revvity, Inc.

Meeting Date: 04/22/2025

Record Date: 02/25/2025

Primary Security ID: 714046109

Country: USA

Meeting Type: Annual

Ticker: RVTY

Shares Voted: 462

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter Barrett	Mgmt	For	For	For

Revvity, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Samuel R. Chapin	Mgmt	For	For	For
1c	Elect Director Michael A. Klobuchar	Mgmt	For	For	For
1d	Elect Director Michelle McMurry-Heath	Mgmt	For	For	For
1e	Elect Director Alexis P. Michas	Mgmt	For	For	For
1f	Elect Director Prahlad R. Singh	Mgmt	For	For	For
1g	Elect Director Sophie V. Vandebroek	Mgmt	For	For	For
1h	Elect Director Michel Vounatsos	Mgmt	For	For	For
1i	Elect Director Frank Witney	Mgmt	For	For	For
1j	Elect Director Pascale Witz	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Rollins, Inc.

Meeting Date: 04/22/2025Country: USATicker: ROL

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 775711104

Shares Voted: 1,381

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Susan R. Bell	Mgmt	For	For	For
1.2	Elect Director Donald P. Carson	Mgmt	For	For	For
1.3	Elect Director Paul D. Donahue	Mgmt	For	For	For
1.4	Elect Director Louise S. Sams	Mgmt	For	For	For
1.5	Elect Director John F. Wilson	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

# Eaton Corporation plc

**Meeting Date:** 04/23/2025

**Country:** Ireland

**Ticker:** ETN

**Record Date:** 02/25/2025

**Meeting Type:** Annual

**Primary Security ID:** G29183103

Shares Voted: 1,863

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Craig Arnold	Mgmt	For	For	For
1b	Elect Director Silvio Napoli	Mgmt	For	For	For
1c	Elect Director Gregory R. Page	Mgmt	For	For	For
1d	Elect Director Sandra Pianalto	Mgmt	For	For	For
1e	Elect Director Robert V. Pragada	Mgmt	For	For	For
1f	Elect Director Paulo Ruiz	Mgmt	For	For	For
1g	Elect Director Lori J. Ryerkerk	Mgmt	For	For	For
1h	Elect Director Andre Schulten	Mgmt	For	For	For
1i	Elect Director Gerald B. Smith	Mgmt	For	For	For
1j	Elect Director Karenann Terrell	Mgmt	For	For	For
1k	Elect Director Dorothy C. Thompson	Mgmt	For	For	For
1l	Elect Director Darryl L. Wilson	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors and Authorize Their Remuneration	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Authorize Issue of Equity with Pre-emptive Rights	Mgmt	For	For	For
5	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
6	Authorize Share Repurchase of Issued Share Capital	Mgmt	For	For	For

# Entegris, Inc.

**Meeting Date:** 04/23/2025

**Country:** USA

**Ticker:** ENTG

**Record Date:** 03/07/2025

**Meeting Type:** Annual

**Primary Security ID:** 29362U104

Shares Voted: 718

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney Clark	Mgmt	For	For	For

Entegris, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director James F. Gentilcore	Mgmt	For	For	For
1c	Elect Director Yvette Kanouff	Mgmt	For	For	For
1d	Elect Director James P. Lederer	Mgmt	For	For	For
1e	Elect Director Bertrand Loy	Mgmt	For	For	For
1f	Elect Director Mary Puma	Mgmt	For	For	For
1g	Elect Director David Reeder	Mgmt	For	For	For
1h	Elect Director Azita Saleki-Gerhardt	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Adopt Simple Majority Vote	SH	None	For	For

Teledyne Technologies Incorporated

Meeting Date: 04/23/2025

Record Date: 03/03/2025

Primary Security ID: 879360105

Country: USA

Meeting Type: Annual

Ticker: TDY

Shares Voted: 214

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert Mehrabian	Mgmt	For	For	For
1.2	Elect Director Jane C. Sherburne	Mgmt	For	For	For
1.3	Elect Director Michael T. Smith	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

Textron Inc.

Meeting Date: 04/23/2025
 Country: USA
 Ticker: TXT

Record Date: 02/24/2025
 Meeting Type: Annual

Primary Security ID: 883203101

Shares Voted: 874

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard F. Ambrose	Mgmt	For	For	For
1b	Elect Director Kathleen M. Bader	Mgmt	For	For	For
1c	Elect Director R. Kerry Clark	Mgmt	For	For	For
1d	Elect Director Scott C. Donnelly	Mgmt	For	For	For
1e	Elect Director Michael X. Garrett	Mgmt	For	For	For
1f	Elect Director Deborah Lee James	Mgmt	For	For	For
1g	Elect Director Thomas A. Kennedy	Mgmt	For	For	For
1h	Elect Director Rob Mionis	Mgmt	For	For	For
1i	Elect Director Lionel L. Nowell III	Mgmt	For	For	For
1j	Elect Director Maria T. Zuber	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

The Cigna Group

Meeting Date: 04/23/2025
 Country: USA
 Ticker: CI

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

Primary Security ID: 125523100

Shares Voted: 1,311

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David M. Cordani	Mgmt	For	For	For
1b	Elect Director Eric J. Foss	Mgmt	For	For	For
1c	Elect Director Elder Granger	Mgmt	For	For	For
1d	Elect Director Neesha Hathi	Mgmt	For	For	For
1e	Elect Director George Kurian	Mgmt	For	For	For
1f	Elect Director Kathleen M. Mazzarella	Mgmt	For	For	For

The Cigna Group

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Mark B. McClellan	Mgmt	For	For	For
1h	Elect Director Philip O. Ozuah	Mgmt	For	For	For
1i	Elect Director Kimberly A. Ross	Mgmt	For	For	For
1j	Elect Director Eric C. Wiseman	Mgmt	For	For	For
1k	Elect Director Donna F. Zarcone	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

The Goldman Sachs Group, Inc.

Meeting Date: 04/23/2025

Country: USA

Ticker: GS

Record Date: 02/24/2025

Meeting Type: Annual

Primary Security ID: 38141G104

Shares Voted: 1,486

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michele Burns	Mgmt	For	For	For
1b	Elect Director Mark Flaherty	Mgmt	For	For	For
1c	Elect Director Kimberley Harris	Mgmt	For	For	For
1d	Elect Director John Hess	Mgmt	For	For	For
1e	Elect Director Kevin Johnson	Mgmt	For	For	For
1f	Elect Director Ellen Kullman	Mgmt	For	For	For
1g	Elect Director KC McClure	Mgmt	For	For	For
1h	Elect Director Lakshmi Mittal	Mgmt	For	For	For
1i	Elect Director Thomas Montag	Mgmt	For	For	For
1j	Elect Director Peter Oppenheimer	Mgmt	For	For	For
1k	Elect Director David Solomon	Mgmt	For	For	For
1l	Elect Director Jan Tighe	Mgmt	For	For	For
1m	Elect Director David Viniar	Mgmt	For	For	For
1n	Elect Director John Waldron	Mgmt	For	For	For

The Goldman Sachs Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Consider Abolishing DEI Goals from Compensation Inducements	SH	Against	Against	Against
6	Conduct and Report a Third-Party Racial Equity Audit on Risks Related to Race-based Initiatives	SH	Against	Against	Against
7	Report on Clean Energy Supply Financing Ratio	SH	Against	Against	Against

The PNC Financial Services Group, Inc.

Meeting Date: 04/23/2025Country: USATicker: PNC

Record Date: 01/31/2025Meeting Type: Annual

Primary Security ID: 693475105

Shares Voted: 1,786					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Joseph Alvarado	Mgmt	For	For	For
1b	Elect Director Debra A. Cafaro	Mgmt	For	For	For
1c	Elect Director Marjorie Rodgers Cheshire	Mgmt	For	For	For
1d	Elect Director Douglas A. Dachille	Mgmt	For	For	For
1e	Elect Director William S. Demchak	Mgmt	For	For	For
1f	Elect Director Andrew T. Feldstein	Mgmt	For	For	For
1g	Elect Director Richard J. Harshman	Mgmt	For	For	For
1h	Elect Director Daniel R. Hesse	Mgmt	For	For	For
1i	Elect Director Renu Khator	Mgmt	For	For	For
1j	Elect Director Linda R. Medler	Mgmt	For	For	For
1k	Elect Director Robert A. Niblock	Mgmt	For	For	For
1l	Elect Director Martin Pfinsgraff	Mgmt	For	For	For
1m	Elect Director Bryan S. Salesky	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

The PNC Financial Services Group, Inc.

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

Avery Dennison Corporation

Meeting Date: 04/24/2025Country: USATicker: AVY

Record Date: 02/24/2025Meeting Type: Annual

Primary Security ID: 053611109

Shares Voted: 370

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Bradley A. Alford	Mgmt	For	For	For
1b	Elect Director Mitchell R. Butier	Mgmt	For	For	For
1c	Elect Director Ward H. Dickson	Mgmt	For	For	For
1d	Elect Director Andres A. Lopez	Mgmt	For	For	For
1e	Elect Director Maria Fernanda Mejia	Mgmt	For	For	For
1f	Elect Director Francesca Reverberi	Mgmt	For	For	For
1g	Elect Director Patrick T. Siewert	Mgmt	For	For	For
1h	Elect Director Deon M. Stander	Mgmt	For	For	For
1i	Elect Director William R. Wagner	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

Citizens Financial Group, Inc.

Meeting Date: 04/24/2025Country: USATicker: CFG

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 174610105

Shares Voted: 2,102

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bruce Van Saun	Mgmt	For	For	For



Citizens Financial Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director Lee Alexander	Mgmt	For	For	For
1.3	Elect Director Tracy A. Atkinson	Mgmt	For	For	For
1.4	Elect Director Christine M. Cumming	Mgmt	For	For	For
1.5	Elect Director Kevin J. Cummings	Mgmt	For	For	For
1.6	Elect Director William P. Hankowsky	Mgmt	For	For	For
1.7	Elect Director Edward J. Kelly, III	Mgmt	For	For	For
1.8	Elect Director Robert G. Leary	Mgmt	For	For	For
1.9	Elect Director Terrance J. Lillis	Mgmt	For	For	For
1.10	Elect Director Michele N. Siekerka	Mgmt	For	For	For
1.11	Elect Director Christopher J. Swift	Mgmt	For	For	For
1.12	Elect Director Claude E. Wade	Mgmt	For	For	For
1.13	Elect Director Marita Zuraitis	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Edison International

Meeting Date: 04/24/2025

Record Date: 02/28/2025

Primary Security ID: 281020107

Country: USA

Meeting Type: Annual

Ticker: EIX

Shares Voted: 1,803

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeanne Beliveau-Dunn	Mgmt	For	For	For
1b	Elect Director Michael C. Camunez	Mgmt	For	For	For
1c	Elect Director Jennifer M. Granholm	Mgmt	For	For	For
1d	Elect Director James T. Morris	Mgmt	For	For	For
1e	Elect Director Timothy T. O'Toole	Mgmt	For	For	For
1f	Elect Director Pedro J. Pizarro	Mgmt	For	For	For

## Edison International

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Marcy L. Reed	Mgmt	For	For	For
1h	Elect Director Carey A. Smith	Mgmt	For	For	For
1i	Elect Director Linda G. Stuntz	Mgmt	For	For	For
1j	Elect Director Peter J. Taylor	Mgmt	For	For	For
1k	Elect Director Keith Trent	Mgmt	For	For	For
2	Ratify PwC as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

## Fastenal Company

Meeting Date: 04/24/2025

Country: USA

Ticker: FAST

Record Date: 02/24/2025

Meeting Type: Annual

Primary Security ID: 311900104

Shares Voted: 2,705					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Scott A. Satterlee	Mgmt	For	For	For
1b	Elect Director Michael J. Ancius	Mgmt	For	For	For
1c	Elect Director Stephen L. Eastman	Mgmt	For	For	For
1d	Elect Director Brady D. Ericson	Mgmt	For	For	For
1e	Elect Director Daniel L. Florness	Mgmt	For	For	For
1f	Elect Director Rita J. Heise	Mgmt	For	For	For
1g	Elect Director Hsenghung Sam Hsu	Mgmt	For	For	For
1h	Elect Director Daniel L. Johnson	Mgmt	For	For	For
1i	Elect Director Sarah N. Nielsen	Mgmt	For	For	For
1j	Elect Director Irene A. Quarshie	Mgmt	For	For	For
1k	Elect Director Reyne K. Wisecup	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Fastenal Company

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

Global Payments Inc.

Meeting Date: 04/24/2025	Country: USA	Ticker: GPN
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 37940X102		

Shares Voted: 1,210

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director F. Thaddeus Arroyo	Mgmt	For	For	For
1b	Elect Director Robert H.B. Baldwin, Jr.	Mgmt	For	For	For
1c	Elect Director Cameron M. Bready	Mgmt	For	For	For
1d	Elect Director John G. Bruno	Mgmt	For	For	For
1e	Elect Director Joia M. Johnson	Mgmt	For	For	For
1f	Elect Director Kirsten M. Kliphouse	Mgmt	For	For	For
1g	Elect Director Connie D. McDaniel	Mgmt	For	For	For
1h	Elect Director Joseph H. Osnoss	Mgmt	For	For	For
1i	Elect Director William B. Plummer	Mgmt	For	For	For
1j	Elect Director M. Troy Woods	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

HCA Healthcare, Inc.

Meeting Date: 04/24/2025	Country: USA	Ticker: HCA
Record Date: 02/24/2025	Meeting Type: Annual	
Primary Security ID: 40412C101		

HCA Healthcare, Inc.

Shares Voted: 875

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas F. Frist, III	Mgmt	For	For	For
1b	Elect Director Samuel N. Hazen	Mgmt	For	For	For
1c	Elect Director Robert J. Dennis	Mgmt	For	For	For
1d	Elect Director Nancy-Ann DeParle	Mgmt	For	For	For
1e	Elect Director William R. Frist	Mgmt	For	For	For
1f	Elect Director Hugh F. Johnston	Mgmt	For	For	For
1g	Elect Director Michael W. Michelson	Mgmt	For	For	For
1h	Elect Director Wayne J. Riley	Mgmt	For	For	For
1i	Elect Director Andrea B. Smith	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
6	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For
7	Amend Patient Safety and Quality of Care Committee Charter	SH	Against	Against	Against
8	Report on Healthcare Consequences of Acquisition Strategy	SH	Against	Against	Against

Healthpeak Properties, Inc.

Meeting Date: 04/24/2025Country: USATicker: DOC

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

Primary Security ID: 42250P103

Shares Voted: 3,217

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Scott M. Brinker	Mgmt	For	For	For
1b	Elect Director Katherine M. Sandstrom	Mgmt	For	For	For

Healthpeak Properties, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director John T. Thomas	Mgmt	For	For	For
1d	Elect Director Brian G. Cartwright	Mgmt	For	For	For
1e	Elect Director James B. Connor	Mgmt	For	For	For
1f	Elect Director R. Kent Griffin, Jr.	Mgmt	For	For	For
1g	Elect Director Pamela J. Kessler	Mgmt	For	For	For
1h	Elect Director Sara G. Lewis	Mgmt	For	For	For
1i	Elect Director Ava E. Lias-Booker	Mgmt	For	For	For
1j	Elect Director Tommy G. Thompson	Mgmt	For	For	For
1k	Elect Director Richard A. Weiss	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

IQVIA Holdings Inc.

Meeting Date: 04/24/2025

Record Date: 02/24/2025

Primary Security ID: 46266C105

Country: USA

Meeting Type: Annual

Ticker: IQV

Shares Voted: 835					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ari Bousbib	Mgmt	For	For	For
1b	Elect Director Carol J. Burt	Mgmt	For	For	For
1c	Elect Director John G. Danhaki	Mgmt	For	For	For
1d	Elect Director James A. Fasano	Mgmt	For	For	For
1e	Elect Director Colleen A. Goggins	Mgmt	For	For	For
1f	Elect Director John M. Leonard	Mgmt	For	For	For
1g	Elect Director Leslie Wims Morris	Mgmt	For	For	For
1h	Elect Director Todd B. Sisitsky	Mgmt	For	For	For
1i	Elect Director Sheila A. Stamps	Mgmt	For	For	For

IQVIA Holdings Inc.

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

J.B. Hunt Transport Services, Inc.

Meeting Date: 04/24/2025Country: USATicker: JBHT

Record Date: 02/18/2025Meeting Type: Annual

Primary Security ID: 445658107

Shares Voted: 370

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Brett Biggs	Mgmt	For	For	For
1.2	Elect Director Francesca M. Edwardson	Mgmt	For	For	For
1.3	Elect Director Sharilyn S. Gasaway	Mgmt	For	For	For
1.4	Elect Director Thad (John B., III) Hill	Mgmt	For	For	For
1.5	Elect Director Bryan Hunt	Mgmt	For	For	For
1.6	Elect Director Persio Lisboa	Mgmt	For	For	For
1.7	Elect Director John N. Roberts, III	Mgmt	For	For	For
1.8	Elect Director James L. Robo	Mgmt	For	For	For
1.9	Elect Director Shelley Simpson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Johnson & Johnson

Meeting Date: 04/24/2025Country: USATicker: JNJ

Record Date: 02/25/2025Meeting Type: Annual

Primary Security ID: 478160104

Johnson & Johnson

Shares Voted: 11,383

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

Pfizer Inc.

Meeting Date: 04/24/2025Country: USATicker: PFE

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

Primary Security ID: 717081103

Shares Voted: 26,972

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ronald E. Blaylock	Mgmt	For	For	For
1.2	Elect Director Albert Bourla	Mgmt	For	For	For
1.3	Elect Director Mortimer J. Buckley	Mgmt	For	For	For
1.4	Elect Director Susan Desmond-Hellmann	Mgmt	For	For	For

Pfizer Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Joseph J. Echevarria	Mgmt	For	For	For
1.6	Elect Director Scott Gottlieb	Mgmt	For	For	For
1.7	Elect Director Susan Hockfield	Mgmt	For	For	For
1.8	Elect Director Dan R. Littman	Mgmt	For	For	For
1.9	Elect Director Shantanu Narayen	Mgmt	For	For	For
1.10	Elect Director Suzanne Nora Johnson	Mgmt	For	For	For
1.11	Elect Director James Quincey	Mgmt	For	For	For
1.12	Elect Director James C. Smith	Mgmt	For	For	For
1.13	Elect Director Cyrus Taraporevala	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against
5	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

Snap-on Incorporated

Meeting Date: 04/24/2025Country: USATicker: SNA

Record Date: 02/24/2025Meeting Type: Annual

Primary Security ID: 833034101

Shares Voted: 240					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director David C. Adams	Mgmt	For	For	For
1.2	Elect Director Karen L. Daniel	Mgmt	For	For	For
1.3	Elect Director Ruth Ann M. Gillis	Mgmt	For	For	For
1.4	Elect Director James P. Holden	Mgmt	For	For	For
1.5	Elect Director Nathan J. Jones	Mgmt	For	For	For
1.6	Elect Director Henry W. Knueppel	Mgmt	For	For	For
1.7	Elect Director W. Dudley Lehman	Mgmt	For	For	For



## Snap-on Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Nicholas T. Pinchuk	Mgmt	For	For	For
1.9	Elect Director Gregg M. Sherrill	Mgmt	For	For	For
1.10	Elect Director Donald J. Stebbins	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

## The Boeing Company

Meeting Date: 04/24/2025	Country: USA	Ticker: BA
Record Date: 02/24/2025	Meeting Type: Annual	
Primary Security ID: 097023105		

Shares Voted: 3,406

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert A. Bradway	Mgmt	For	For	For
1b	Elect Director Mortimer J. "Tim" Buckley	Mgmt	For	For	For
1c	Elect Director Lynne M. Doughtie	Mgmt	For	For	For
1d	Elect Director David L. Gitlin	Mgmt	For	For	For
1e	Elect Director Lynn J. Good	Mgmt	For	For	For
1f	Elect Director Stayce D. Harris	Mgmt	For	For	For
1g	Elect Director Akhil Johri	Mgmt	For	For	For
1h	Elect Director David L. Joyce	Mgmt	For	For	For
1i	Elect Director Steven M. Mollenkopf	Mgmt	For	For	For
1j	Elect Director Robert Kelly Ortberg	Mgmt	For	For	For
1k	Elect Director John M. Richardson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Risks Created by the Company's Diversity, Equity, and Inclusion Efforts	SH	Against	Against	Against

## The Boeing Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Oversee and Report a Civil Rights Audit	SH	Against	Against	Against

## Abbott Laboratories

Meeting Date: 04/25/2025	Country: USA	Ticker: ABT
Record Date: 02/26/2025	Meeting Type: Annual	
Primary Security ID: 002824100		

Shares Voted: 8,215

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert J. Alpern	Mgmt	For	For	For
1.2	Elect Director Claire Babineaux-Fontenot	Mgmt	For	For	For
1.3	Elect Director Sally E. Blount	Mgmt	For	For	For
1.4	Elect Director Robert B. Ford	Mgmt	For	For	For
1.5	Elect Director Paola Gonzalez	Mgmt	For	For	For
1.6	Elect Director Michelle A. Kumbier	Mgmt	For	For	For
1.7	Elect Director Darren W. McDew	Mgmt	For	For	For
1.8	Elect Director Nancy McKinstry	Mgmt	For	For	For
1.9	Elect Director Michael G. O'Grady	Mgmt	For	For	For
1.10	Elect Director Michael F. Roman	Mgmt	For	For	For
1.11	Elect Director Daniel J. Starks	Mgmt	For	For	For
1.12	Elect Director John G. Stratton	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

## Graco Inc.

Meeting Date: 04/25/2025	Country: USA	Ticker: GGG
Record Date: 02/24/2025	Meeting Type: Annual	
Primary Security ID: 384109104		

Graco Inc.

Shares Voted: 768

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eric P. Etchart	Mgmt	For	For	For
1b	Elect Director Jody H. Feragen	Mgmt	For	For	For
1c	Elect Director J. Kevin Gilligan	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Stanley Black & Decker, Inc.

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

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 854502101

Shares Voted: 734

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Donald Allan, Jr.	Mgmt	For	For	For
1b	Elect Director Andrea J. Ayers	Mgmt	For	For	For
1c	Elect Director Susan K. Carter	Mgmt	For	For	For
1d	Elect Director Debra A. Crew	Mgmt	For	For	For
1e	Elect Director John L. Garrison, Jr.	Mgmt	For	For	For
1f	Elect Director Michael D. Hankin	Mgmt	For	For	For
1g	Elect Director Robert J. Manning	Mgmt	For	For	For
1h	Elect Director Adrian V. Mitchell	Mgmt	For	For	For
1i	Elect Director Jane M. Palmieri	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Steel Dynamics, Inc.

Meeting Date: 04/25/2025

Record Date: 03/06/2025

Primary Security ID: 858119100

Country: USA

Meeting Type: Annual

Ticker: STLD

Shares Voted: 666

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Mark D. Millett	Mgmt	For	For	For
1B	Elect Director Sheree L. Bargabos	Mgmt	For	For	For
1C	Elect Director Kenneth W. Cornew	Mgmt	For	For	For
1D	Elect Director Traci M. Dolan	Mgmt	For	For	For
1E	Elect Director Jennifer L. Hamann	Mgmt	For	For	For
1F	Elect Director Bradley S. Seaman	Mgmt	For	For	For
1G	Elect Director Gabriel L. Shaheen	Mgmt	For	For	For
1H	Elect Director Luis M. Sierra	Mgmt	For	For	For
1I	Elect Director Richard P. Teets, Jr.	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

Genuine Parts Company

Meeting Date: 04/28/2025

Record Date: 02/19/2025

Primary Security ID: 372460105

Country: USA

Meeting Type: Annual

Ticker: GPC

Shares Voted: 625

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard Cox, Jr.	Mgmt	For	For	For
1b	Elect Director Paul D. Donahue	Mgmt	For	For	For
1c	Elect Director P. Russell Hardin	Mgmt	For	For	For
1d	Elect Director John R. Holder	Mgmt	For	For	For
1e	Elect Director Donna W. Hyland	Mgmt	For	For	For

## Genuine Parts Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Jean-Jacques Lafont	Mgmt	For	For	For
1g	Elect Director Robert C. "Robin" Loudermilk, Jr.	Mgmt	For	For	For
1h	Elect Director Juliette W. Pryor	Mgmt	For	For	For
1i	Elect Director Darren Rebelez	Mgmt	For	For	For
1j	Elect Director Laurie Schupmann	Mgmt	For	For	For
1k	Elect Director William P. Stengel, II	Mgmt	For	For	For
1l	Elect Director Charles K. Stevens, III	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Articles of Incorporation	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Report on Effectiveness of Diversity Equity and Inclusion Efforts and Metrics	SH	Against	Against	Against

## American Electric Power Company, Inc.

Meeting Date: 04/29/2025

Country: USA

Ticker: AEP

Record Date: 03/04/2025

Meeting Type: Annual

Primary Security ID: 025537101

Shares Voted: 2,537

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bill Fehrman	Mgmt	For	For	For
1.2	Elect Director Ben Fowke	Mgmt	For	For	For
1.3	Elect Director Art A. Garcia	Mgmt	For	For	For
1.4	Elect Director Hunter C. Gary	Mgmt	For	For	For
1.5	Elect Director Sandra Beach Lin	Mgmt	For	For	For
1.6	Elect Director Henry P. Linginfelter	Mgmt	For	For	For
1.7	Elect Director Margaret M. McCarthy	Mgmt	For	For	For
1.8	Elect Director Daryl Roberts	Mgmt	For	For	For
1.9	Elect Director Joseph G. Sauvage	Mgmt	For	For	For

American Electric Power Company, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Daniel G. Stoddard	Mgmt	For	For	For
1.11	Elect Director Sara Martinez Tucker	Mgmt	For	For	For
1.12	Elect Director Lewis Von Thaer	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

American Express Company

Meeting Date: 04/29/2025

Country: USA

Ticker: AXP

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 025816109

Shares Voted: 2,650

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael J. Angelakis	Mgmt	For	For	For
1b	Elect Director Thomas J. Baltimore	Mgmt	For	For	For
1c	Elect Director John J. Brennan	Mgmt	For	For	For
1d	Elect Director Theodore J. Leonsis	Mgmt	For	For	For
1e	Elect Director Deborah P. Majoras	Mgmt	For	For	For
1f	Elect Director Karen L. Parkhill	Mgmt	For	For	For
1g	Elect Director Charles E. Phillips	Mgmt	For	For	For
1h	Elect Director Lynn A. Pike	Mgmt	For	For	For
1i	Elect Director Stephen J. Squeri	Mgmt	For	For	For
1j	Elect Director Daniel L. Vasella	Mgmt	For	For	For
1k	Elect Director Lisa W. Wardell	Mgmt	For	For	For
1l	Elect Director Christopher D. Young	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

American Express Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Revisit Pay Incentives for Diversity, Equity, and Inclusion Goals	SH	Against	Against	Against
5	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

Citigroup Inc.

Meeting Date: 04/29/2025	Country: USA	Ticker: C
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 172967424		

Shares Voted: 8,696

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Titi Cole	Mgmt	For	For	For
1b	Elect Director Ellen M. Costello	Mgmt	For	For	For
1c	Elect Director Grace E. Dailey	Mgmt	For	For	For
1d	Elect Director John C. Dugan	Mgmt	For	For	For
1e	Elect Director Jane N. Fraser	Mgmt	For	For	For
1f	Elect Director Duncan P. Hennes	Mgmt	For	For	For
1g	Elect Director Peter B. Henry	Mgmt	For	For	For
1h	Elect Director Renee J. James	Mgmt	For	For	For
1i	Elect Director Gary M. Reiner	Mgmt	For	For	For
1j	Elect Director Diana L. Taylor	Mgmt	For	For	For
1k	Elect Director James S. Turley	Mgmt	For	For	For
1l	Elect Director Casper W. von Koskull	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	For	For
6	Report on Respecting Indigenous Peoples' Rights	SH	Against	Against	Against

Citigroup Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
7	Issue Audited Report on Financial Statement Assumptions and Climate Change	SH	Against	Against	Against
8	Disclose Board Oversight Regarding Material Risks Associated with Animal Welfare	SH	Against	Against	Against

Constellation Energy Corporation

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

Record Date: 03/05/2025Meeting Type: Annual

Primary Security ID: 21037T109

Shares Voted: 1,496

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Yves C. de Balmann	Mgmt	For	For	For
1.2	Elect Director Robert J. Lawless	Mgmt	For	For	For
1.3	Elect Director Peter Oppenheimer	Mgmt	For	For	For
1.4	Elect Director Eileen Paterson	Mgmt	For	For	For
1.5	Elect Director John M. Richardson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Exelon Corporation

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

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

Primary Security ID: 30161N101

Shares Voted: 4,750

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director W. Paul Bowers	Mgmt	For	For	For
1b	Elect Director Calvin G. Butler, Jr.	Mgmt	For	For	For



Exelon Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Marjorie Rodgers Cheshire	Mgmt	For	For	For
1d	Elect Director David DeWalt	Mgmt	For	For	For
1e	Elect Director Linda Jojo	Mgmt	For	For	For
1f	Elect Director Charisse Lillie	Mgmt	For	For	For
1g	Elect Director Anna Richo	Mgmt	For	For	For
1h	Elect Director Matthew Rogers	Mgmt	For	For	For
1i	Elect Director Bryan Segedi	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

First Citizens BancShares, Inc.

Meeting Date: 04/29/2025

Record Date: 03/03/2025

Primary Security ID: 31946M103

Country: USA

Meeting Type: Annual

Ticker: FCNCA

Shares Voted: 49					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ellen R. Alemany	Mgmt	For	For	For
1.2	Elect Director Victor E. Bell, III	Mgmt	For	Withhold	Withhold
1.3	Elect Director Peter M. Bristow	Mgmt	For	For	For
1.4	Elect Director Hope H. Bryant	Mgmt	For	For	For
1.5	Elect Director Eugene Flood, Jr.	Mgmt	For	For	For
1.6	Elect Director Frank B. Holding, Jr.	Mgmt	For	For	For
1.7	Elect Director Robert R. Hoppe	Mgmt	For	For	For
1.8	Elect Director David G. Leitch	Mgmt	For	Withhold	Withhold
1.9	Elect Director Robert E. Mason, IV	Mgmt	For	Withhold	Withhold
1.10	Elect Director Robert T. Newcomb	Mgmt	For	Withhold	Withhold
1.11	Elect Director R. Mattox Snow, III	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

First Citizens BancShares, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

International Business Machines Corporation

Meeting Date: 04/29/2025	Country: USA	Ticker: IBM
Record Date: 02/28/2025	Meeting Type: Annual	
Primary Security ID: 459200101		

Shares Voted: 4,425

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marianne C. Brown	Mgmt	For	For	For
1b	Elect Director Thomas Buberl	Mgmt	For	For	For
1c	Elect Director David N. Farr	Mgmt	For	For	For
1d	Elect Director Alex Gorsky	Mgmt	For	For	For
1e	Elect Director Michelle J. Howard	Mgmt	For	For	For
1f	Elect Director Arvind Krishna	Mgmt	For	For	For
1g	Elect Director Andrew N. Liveris	Mgmt	For	For	For
1h	Elect Director Frederick William McNabb, III	Mgmt	For	For	For
1i	Elect Director Michael Miebach	Mgmt	For	For	For
1j	Elect Director Martha E. Pollack	Mgmt	For	For	For
1k	Elect Director Peter R. Voser	Mgmt	For	For	For
1l	Elect Director Frederick H. Waddell	Mgmt	For	For	For
1m	Elect Director Alfred W. Zollar	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	Against	Against
5	Report on Risks of Discriminating Based on Religious and Political Views	SH	Against	Against	Against

Kimco Realty Corporation

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

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

Primary Security ID: 49446R109

Shares Voted: 3,114

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ross Cooper	Mgmt	For	For	For
1b	Elect Director Philip E. Coviello	Mgmt	For	For	For
1c	Elect Director Conor C. Flynn	Mgmt	For	For	For
1d	Elect Director Nancy Lashine	Mgmt	For	For	For
1e	Elect Director Frank Lourenso	Mgmt	For	For	For
1f	Elect Director Henry Moniz	Mgmt	For	For	For
1g	Elect Director Mary Hogan Preusse	Mgmt	For	For	For
1h	Elect Director Valerie Richardson	Mgmt	For	For	For
1i	Elect Director Richard B. Saltzman	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For

PACCAR Inc

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

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

Primary Security ID: 693718108

Shares Voted: 2,451

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mark C. Pigott	Mgmt	For	For	For
1.2	Elect Director Pierre R. Breber	Mgmt	For	For	For
1.3	Elect Director Dame Alison J. Carnwath	Mgmt	For	For	For
1.4	Elect Director R. Preston Feight	Mgmt	For	For	For
1.5	Elect Director Kirk S. Hachigian	Mgmt	For	For	For
1.6	Elect Director Brice A. Hill	Mgmt	For	For	For
1.7	Elect Director Barbara B. Hulit	Mgmt	For	For	For

PACCAR Inc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Cynthia A. Niekamp	Mgmt	For	For	For
1.9	Elect Director John M. Pigott	Mgmt	For	For	For
1.10	Elect Director Luiz A. S. Pretti	Mgmt	For	For	For
1.11	Elect Director Ganesh Ramaswamy	Mgmt	For	For	For
1.12	Elect Director Mark A. Schulz	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

The Williams Companies, Inc.

Meeting Date: 04/29/2025	Country: USA	Ticker: WMB
Record Date: 03/06/2025	Meeting Type: Annual	
Primary Security ID: 969457100		

Shares Voted: 5,827

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alan S. Armstrong	Mgmt	For	For	For
1.2	Elect Director Stephen W. Bergstrom	Mgmt	For	For	For
1.3	Elect Director Michael A. Creel	Mgmt	For	For	For
1.4	Elect Director Stacey H. Dore	Mgmt	For	For	For
1.5	Elect Director Carri A. Lockhart	Mgmt	For	For	For
1.6	Elect Director Richard E. Muncrief	Mgmt	For	For	For
1.7	Elect Director Peter A. Ragauss	Mgmt	For	For	For
1.8	Elect Director Rose M. Robeson	Mgmt	For	For	For
1.9	Elect Director Scott D. Sheffield	Mgmt	For	For	For
1.10	Elect Director William H. Spence	Mgmt	For	For	For
1.11	Elect Director Jesse J. Tyson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

# Truist Financial Corporation

Meeting Date: 04/29/2025

Country: USA

Ticker: TFC

Record Date: 02/20/2025

Meeting Type: Annual

Primary Security ID: 89832Q109

Shares Voted: 6,247

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jennifer S. Banner	Mgmt	For	For	For
1b	Elect Director K. David Boyer, Jr.	Mgmt	For	For	For
1c	Elect Director Agnes Bundy Scanlan	Mgmt	For	For	For
1d	Elect Director Dallas S. Clement	Mgmt	For	For	For
1e	Elect Director Linnie M. Haynesworth	Mgmt	For	For	For
1f	Elect Director Donna S. Morea	Mgmt	For	For	For
1g	Elect Director Charles A. Patton	Mgmt	For	For	For
1h	Elect Director William H. Rogers, Jr.	Mgmt	For	For	For
1i	Elect Director Thomas E. Skains	Mgmt	For	For	For
1j	Elect Director Laurence Stein	Mgmt	For	For	For
1k	Elect Director Bruce L. Tanner	Mgmt	For	For	For
1l	Elect Director Steven C. Voorhees	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

# VICI Properties Inc.

Meeting Date: 04/29/2025

Country: USA

Ticker: VICI

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 925652109

Shares Voted: 5,038

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director James R. Abrahamson	Mgmt	For	For	For
1b	Elect Director Diana F. Cantor	Mgmt	For	For	For

VICI Properties Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Monica H. Douglas	Mgmt	For	For	For
1d	Elect Director Elizabeth I. Holland	Mgmt	For	For	For
1e	Elect Director Craig Macnab	Mgmt	For	For	For
1f	Elect Director Edward B. Pitoniak	Mgmt	For	For	For
1g	Elect Director Michael D. Rumbolz	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Wells Fargo & Company

Meeting Date: 04/29/2025	Country: USA	Ticker: WFC
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 949746101		

Shares Voted: 15,738

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Steven D. Black	Mgmt	For	For	For
1b	Elect Director Mark A. Chancy	Mgmt	For	For	For
1c	Elect Director Celeste A. Clark	Mgmt	For	For	For
1d	Elect Director Theodore F. Craver, Jr.	Mgmt	For	For	For
1e	Elect Director Richard K. Davis	Mgmt	For	For	For
1f	Elect Director Fabian T. Garcia	Mgmt	For	For	For
1g	Elect Director Wayne M. Hewett	Mgmt	For	For	For
1h	Elect Director CeCelia G. Morken	Mgmt	For	For	For
1i	Elect Director Maria R. Morris	Mgmt	For	For	For
1j	Elect Director Felicia F. Norwood	Mgmt	For	For	For
1k	Elect Director Ronald L. Sargent	Mgmt	For	For	For
1l	Elect Director Charles W. Scharf	Mgmt	For	For	For
1m	Elect Director Suzanne M. Vautrinot	Mgmt	For	For	For

Wells Fargo & Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Report on Prevention of Workplace Harassment and Discrimination	SH	Against	Against	Against
5	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	Against	Against
6	Report Annually on Energy Supply Ratio	SH	Against	Against	Against
7	Report on Respecting Indigenous Peoples' Rights	SH	Against	Against	Against

Ameriprise Financial, Inc.

Meeting Date: 04/30/2025	Country: USA	Ticker: AMP
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 03076C106		

Shares Voted: 459					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director James M. Cracchiolo	Mgmt	For	For	For
1b	Elect Director Robert F. Sharpe, Jr.	Mgmt	For	For	For
1c	Elect Director Dianne Neal Blixt	Mgmt	For	For	For
1d	Elect Director Amy DiGeso	Mgmt	For	For	For
1e	Elect Director Christopher J. Williams	Mgmt	For	For	For
1f	Elect Director Glynis A. Bryan	Mgmt	For	For	For
1g	Elect Director Brian T. Shea	Mgmt	For	For	For
1h	Elect Director W. Edward Walter, III	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Ball Corporation

Meeting Date: 04/30/2025

Record Date: 02/20/2025

Primary Security ID: 058498106

Country: USA

Meeting Type: Annual

Ticker: BALL

Shares Voted: 1,397

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John A. Bryant	Mgmt	For	For	For
1b	Elect Director Michael J. Cave	Mgmt	For	For	For
1c	Elect Director Aaron M. Erter	Mgmt	For	For	For
1d	Elect Director Daniel W. Fisher	Mgmt	For	For	For
1e	Elect Director Dune E. Ives	Mgmt	For	For	For
1f	Elect Director Cynthia A. Niekamp	Mgmt	For	For	For
1g	Elect Director Todd A. Penegor	Mgmt	For	For	For
1h	Elect Director Cathy D. Ross	Mgmt	For	For	For
1i	Elect Director Betty J. Sapp	Mgmt	For	For	For
1j	Elect Director Stuart A. Taylor, II	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Articles of Incorporation to Eliminate Default Board Size	Mgmt	For	For	For

Carlisle Companies Incorporated

Meeting Date: 04/30/2025

Record Date: 03/05/2025

Primary Security ID: 142339100

Country: USA

Meeting Type: Annual

Ticker: CSL

Shares Voted: 205

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jonathan R. Collins	Mgmt	For	For	For
1b	Elect Director D. Christian Koch	Mgmt	For	For	For
1c	Elect Director C. David Myers	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For



## Carlisle Companies Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

## Corteva, Inc.

Meeting Date: 04/30/2025	Country: USA	Ticker: CTVA
Record Date: 03/05/2025	Meeting Type: Annual	
Primary Security ID: 22052L104		

Shares Voted: 3,272

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lamberto Andreotti	Mgmt	For	For	For
1b	Elect Director Klaus A. Engel	Mgmt	For	For	For
1c	Elect Director David C. Everitt	Mgmt	For	For	For
1d	Elect Director Janet P. Giesselman	Mgmt	For	For	For
1e	Elect Director Karen H. Grimes	Mgmt	For	For	For
1f	Elect Director Michael O. Johanns	Mgmt	For	For	For
1g	Elect Director Marcos M. Lutz	Mgmt	For	For	For
1h	Elect Director Charles V. Magro	Mgmt	For	For	For
1i	Elect Director Nayaki R. Nayyar	Mgmt	For	For	For
1j	Elect Director Gregory R. Page	Mgmt	For	For	For
1k	Elect Director Kerry J. Preete	Mgmt	For	For	For
1l	Elect Director Patrick J. Ward	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Coterra Energy Inc.

Meeting Date: 04/30/2025	Country: USA	Ticker: CTRA
Record Date: 03/06/2025	Meeting Type: Annual	
Primary Security ID: 127097103		

Coterra Energy Inc.

Shares Voted: 3,544

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Dorothy M. Ables	Mgmt	For	For	For
1.2	Elect Director Amanda M. Brock	Mgmt	For	For	For
1.3	Elect Director Paul N. Eckley	Mgmt	For	For	For
1.4	Elect Director Hans Helmerich	Mgmt	For	For	For
1.5	Elect Director Jacinto J. Hernandez	Mgmt	For	For	For
1.6	Elect Director Thomas E. Jorden	Mgmt	For	For	For
1.7	Elect Director Jeffrey E. Shellebarger	Mgmt	For	For	For
1.8	Elect Director Lisa A. Stewart	Mgmt	For	For	For
1.9	Elect Director Frances M. Vallejo	Mgmt	For	For	For
1.10	Elect Director Marcus A. Watts	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Marathon Petroleum Corporation

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

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

Primary Security ID: 56585A102

Shares Voted: 1,528

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Evan Bayh	Mgmt	For	For	For
1b	Elect Director Jeffrey C. Campbell	Mgmt	For	For	For
1c	Elect Director Kimberly N. Ellison-Taylor	Mgmt	For	For	For
1d	Elect Director Kim K.W. Rucker	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

## Marathon Petroleum Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Declassify the Board of Directors	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
6	Adopt Simple Majority Vote	SH	Against	For	For

## Moderna, Inc.

Meeting Date: 04/30/2025

Record Date: 03/05/2025

Primary Security ID: 60770K107

Country: USA

Meeting Type: Annual

Ticker: MRNA

Shares Voted: 1,579

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Noubar B. Afeyan	Mgmt	For	For	For
1b	Elect Director Stéphane Bancel	Mgmt	For	For	For
1c	Elect Director François Nader	Mgmt	For	Against	Against
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## Molina Healthcare, Inc.

Meeting Date: 04/30/2025

Record Date: 03/07/2025

Primary Security ID: 60855R100

Country: USA

Meeting Type: Annual

Ticker: MOH

Shares Voted: 259

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Barbara L. Brasier	Mgmt	For	For	For
1b	Elect Director Leo P. Grohowski	Mgmt	For	For	For
1c	Elect Director Stephen H. Lockhart	Mgmt	For	For	For
1d	Elect Director Steven J. Orlando	Mgmt	For	For	For
1e	Elect Director Ronna E. Romney	Mgmt	For	For	For
1f	Elect Director Richard M. Schapiro	Mgmt	For	For	For

Molina Healthcare, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Dale B. Wolf	Mgmt	For	For	For
1h	Elect Director Richard C. Zoretic	Mgmt	For	For	For
1i	Elect Director Joseph M. Zubretsky	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

Newmont Corporation

Meeting Date: 04/30/2025

Record Date: 03/03/2025

Primary Security ID: 651639106

Country: USA

Meeting Type: Annual

Ticker: NEM

Shares Voted: 5,400					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Gregory H. Boyce	Mgmt	For	For	For
1.2	Elect Director Bruce R. Brook	Mgmt	For	For	For
1.3	Elect Director Maura J. Clark	Mgmt	For	For	For
1.4	Elect Director Harry M. (Red) Conger, IV	Mgmt	For	For	For
1.5	Elect Director Emma FitzGerald	Mgmt	For	For	For
1.6	Elect Director Sally-Anne Layman	Mgmt	For	For	For
1.7	Elect Director José Manuel Madero	Mgmt	For	For	For
1.8	Elect Director René Médori	Mgmt	For	For	For
1.9	Elect Director Jane Nelson	Mgmt	For	For	For
1.10	Elect Director Tom Palmer	Mgmt	For	For	For
1.11	Elect Director Julio M. Quintana	Mgmt	For	For	For
1.12	Elect Director David T. Seaton	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Newmont Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Pool Corporation

Meeting Date: 04/30/2025	Country: USA	Ticker: POOL
Record Date: 03/12/2025	Meeting Type: Annual	
Primary Security ID: 73278L105		

Shares Voted: 180					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter D. Arvan	Mgmt	For	For	For
1b	Elect Director Martha S. Gervasi	Mgmt	For	For	For
1c	Elect Director James D. Hope	Mgmt	For	For	For
1d	Elect Director Kevin M. Murphy	Mgmt	For	For	For
1e	Elect Director Debra S. Oler	Mgmt	For	For	For
1f	Elect Director Manuel J. Perez de la Mesa	Mgmt	For	For	For
1g	Elect Director Carlos A. Sabater	Mgmt	For	For	For
1h	Elect Director John E. Stokely	Mgmt	For	For	For
1i	Elect Director David G. Whalen	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

PulteGroup, Inc.

Meeting Date: 04/30/2025	Country: USA	Ticker: PHM
Record Date: 03/06/2025	Meeting Type: Annual	
Primary Security ID: 745867101		

Shares Voted: 950					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kristen Actis-Grande	Mgmt	For	For	For
1b	Elect Director Brian P. Anderson	Mgmt	For	For	For
1c	Elect Director Bryce Blair	Mgmt	For	For	For

PulteGroup, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Thomas J. Folliard	Mgmt	For	For	For
1e	Elect Director Cheryl W. Grisé	Mgmt	For	For	For
1f	Elect Director André J. Hawaux	Mgmt	For	For	For
1g	Elect Director Ryan R. Marshall	Mgmt	For	For	For
1h	Elect Director John R. Peshkin	Mgmt	For	For	For
1i	Elect Director Scott F. Powers	Mgmt	For	For	For
1j	Elect Director Lila Snyder	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against
5	Adopt GHG Emissions Reduction Targets Aligned with the Paris Agreement Goal	SH	Against	Against	Against

The Coca-Cola Company

Meeting Date: 04/30/2025	Country: USA	Ticker: KO
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 191216100		

Shares Voted: 18,554

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Herb Allen	Mgmt	For	For	For
1.2	Elect Director Bela Bajaria	Mgmt	For	For	For
1.3	Elect Director Ana Botin	Mgmt	For	For	For
1.4	Elect Director Christopher C. Davis	Mgmt	For	For	For
1.5	Elect Director Carolyn Everson	Mgmt	For	For	For
1.6	Elect Director Thomas S. Gayner	Mgmt	For	For	For
1.7	Elect Director Maria Elena Lagomasino	Mgmt	For	For	For
1.8	Elect Director Amity Millhiser	Mgmt	For	For	For
1.9	Elect Director James Quincey	Mgmt	For	For	For
1.10	Elect Director Caroline J. Tsay	Mgmt	For	For	For
1.11	Elect Director David B. Weinberg	Mgmt	For	For	For

## The Coca-Cola Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Issue Third Party Assessment of Safety of Non-Sugar Sweeteners	SH	Against	Against	Against
5	Report on Food Waste Management and Targets to Reduce Food Waste	SH	Against	Against	Against
6	Establish a Board Committee on Improper Influence	SH	Against	Against	Against
7	Consider Abolishing DEI Goals from Compensation Inducements	SH	Against	Against	Against
8	Report on Impacts Related to Associating Brand with Politically Divisive Events	SH	Against	Against	Against
9	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

## Vistra Corp.

Meeting Date: 04/30/2025	Country: USA	Ticker: VST
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 92840M102		

Shares Voted: 1,598

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Scott B. Helm	Mgmt	For	For	For
1.2	Elect Director Hilary E. Ackermann	Mgmt	For	For	For
1.3	Elect Director Arcilia C. Acosta	Mgmt	For	For	For
1.4	Elect Director Gavin R. Baiera	Mgmt	For	For	For
1.5	Elect Director Paul M. Barbas	Mgmt	For	For	For
1.6	Elect Director James A. Burke	Mgmt	For	For	For
1.7	Elect Director Lisa Crutchfield	Mgmt	For	For	For
1.8	Elect Director Julie A. Lagacy	Mgmt	For	For	For
1.9	Elect Director John W. (Bill) Pitesa	Mgmt	For	For	For
1.10	Elect Director John R. (J. R.) Sult	Mgmt	For	For	For

Vistra Corp.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.11	Elect Director Robert C. Walters	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
4	Amend Certificate of Incorporation	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
6	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
7	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

W.W. Grainger, Inc.

Meeting Date: 04/30/2025

Country: USA

Ticker: GWW

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 384802104

Shares Voted: 210					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney C. Adkins	Mgmt	For	For	For
1b	Elect Director George S. Davis	Mgmt	For	For	For
1c	Elect Director Katherine D. Jaspon	Mgmt	For	For	For
1d	Elect Director Christopher J. Klein	Mgmt	For	For	For
1e	Elect Director D.G. Macpherson	Mgmt	For	For	For
1f	Elect Director Cindy J. Miller	Mgmt	For	For	For
1g	Elect Director Neil S. Novich	Mgmt	For	For	For
1h	Elect Director Beatriz R. Perez	Mgmt	For	For	For
1i	Elect Director E. Scott Santi	Mgmt	For	For	For
1j	Elect Director Susan Slavik Williams	Mgmt	For	For	For
1k	Elect Director Lucas E. Watson	Mgmt	For	For	For
1l	Elect Director Steven A. White	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For



W.W. Grainger, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Cumulative Voting	Mgmt	For	For	For

Boston Scientific Corporation

Meeting Date: 05/01/2025Country: USATicker: BSX

Record Date: 03/07/2025Meeting Type: Annual

Primary Security ID: 101137107

Shares Voted: 7,139

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Yoshiaki Fujimori	Mgmt	For	For	For
1b	Elect Director David C. Habiger	Mgmt	For	For	For
1c	Elect Director Edward J. Ludwig	Mgmt	For	For	For
1d	Elect Director Michael F. Mahoney	Mgmt	For	For	For
1e	Elect Director Jessica L. Mega	Mgmt	For	For	For
1f	Elect Director Susan E. Morano	Mgmt	For	For	For
1g	Elect Director Cheryl Pegus	Mgmt	For	For	For
1h	Elect Director John E. Sununu	Mgmt	For	For	For
1i	Elect Director David S. Wichmann	Mgmt	For	For	For
1j	Elect Director Ellen M. Zane	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Adopt Simple Majority Vote	SH	None	For	For

Church & Dwight Co., Inc.

Meeting Date: 05/01/2025Country: USATicker: CHD

Record Date: 03/05/2025Meeting Type: Annual

Primary Security ID: 171340102

Church & Dwight Co., Inc.

Shares Voted: 1,171

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Bradlen S. Cashaw	Mgmt	For	For	For
1b	Elect Director Richard A. Dierker	Mgmt	For	For	For
1c	Elect Director Matthew T. Farrell	Mgmt	For	For	For
1d	Elect Director Bradley C. Irwin	Mgmt	For	For	For
1e	Elect Director Penry W. Price	Mgmt	For	For	For
1f	Elect Director Susan G. Saideman	Mgmt	For	For	For
1g	Elect Director Ravichandra K. Saligram	Mgmt	For	For	For
1h	Elect Director Robert K. Shearer	Mgmt	For	For	For
1i	Elect Director Michael R. Smith	Mgmt	For	For	For
1j	Elect Director Janet S. Vergis	Mgmt	For	For	For
1k	Elect Director Arthur B. Winkleblack	Mgmt	For	For	For
1l	Elect Director Laurie J. Yoler	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

Corning Incorporated

Meeting Date: 05/01/2025Country: USATicker: GLW

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

Primary Security ID: 219350105

Shares Voted: 3,673

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Leslie A. Brun	Mgmt	For	For	For
1b	Elect Director Stephanie A. Burns	Mgmt	For	For	For
1c	Elect Director Pamela J. Craig	Mgmt	For	For	For
1d	Elect Director Robert F. Cummings, Jr.	Mgmt	For	For	For

Corning Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Roger W. Ferguson, Jr.	Mgmt	For	For	For
1f	Elect Director Thomas D. French	Mgmt	For	For	For
1g	Elect Director Daniel P. Huttenlocher	Mgmt	For	For	For
1h	Elect Director Kevin J. Martin	Mgmt	For	For	For
1i	Elect Director Wendell P. Weeks	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Duke Energy Corporation

Meeting Date: 05/01/2025

Country: USA

Ticker: DUK

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 26441C204

Shares Voted: 3,696

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Derrick Burks	Mgmt	For	For	For
1b	Elect Director Annette K. Clayton	Mgmt	For	For	For
1c	Elect Director Theodore F. Craver, Jr.	Mgmt	For	For	For
1d	Elect Director Robert M. Davis	Mgmt	For	For	For
1e	Elect Director Caroline Dorsa	Mgmt	For	For	For
1f	Elect Director W. Roy Dunbar	Mgmt	For	For	For
1g	Elect Director Nicholas C. Fanandakis	Mgmt	For	For	For
1h	Elect Director John T. Herron	Mgmt	For	For	For
1i	Elect Director Idalene F. Kesner	Mgmt	For	For	For
1j	Elect Director E. Marie McKee	Mgmt	For	For	For
1k	Elect Director Michael J. Pacilio	Mgmt	For	For	For
1l	Elect Director Harry K. Sideris	Mgmt	For	For	For
1m	Elect Director Thomas E. Skains	Mgmt	For	For	For
1n	Elect Director William E. Webster, Jr.	Mgmt	For	For	For

Duke Energy Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Adopt Simple Majority Vote	SH	For	For	For
5	Report on Net Zero Activities	SH	Against	Against	Against

Eversource Energy

Meeting Date: 05/01/2025

Country: USA

Ticker: ES

Record Date: 03/04/2025

Meeting Type: Annual

Primary Security ID: 30040W108

Shares Voted: 1,746

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cotton M. Cleveland	Mgmt	For	For	For
1.2	Elect Director Linda Dorcena Forry	Mgmt	For	For	For
1.3	Elect Director Gregory M. Jones	Mgmt	For	For	For
1.4	Elect Director Loretta D. Keane	Mgmt	For	For	For
1.5	Elect Director John Y. Kim	Mgmt	For	For	For
1.6	Elect Director David H. Long	Mgmt	For	For	For
1.7	Elect Director Joseph R. Nolan, Jr.	Mgmt	For	For	For
1.8	Elect Director Daniel J. Nova	Mgmt	For	For	For
1.9	Elect Director Frederica M. Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Declaration of Trust to Eliminate Supermajority Vote Requirement and Allow Virtual Annual Meetings	Mgmt	For	For	For
5	Require Independent Board Chair	SH	Against	For	For

International Flavors & Fragrances Inc.

Meeting Date: 05/01/2025

Record Date: 03/07/2025

Primary Security ID: 459506101

Country: USA

Meeting Type: Annual

Ticker: IFF

Shares Voted: 1,240

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kathryn J. Boor	Mgmt	For	For	For
1b	Elect Director Mark J. Costa	Mgmt	For	For	For
1c	Elect Director John F. Ferraro	Mgmt	For	For	For
1d	Elect Director J. Erik Fyrwald	Mgmt	For	For	For
1e	Elect Director Vincent J. Intrieri	Mgmt	For	For	For
1f	Elect Director Cynthia T. Jamison	Mgmt	For	For	For
1g	Elect Director Mehmood Khan	Mgmt	For	For	For
1h	Elect Director Kevin O'Byrne	Mgmt	For	For	For
1i	Elect Director Margarita Palau-Hernandez	Mgmt	For	For	For
1j	Elect Director Dawn C. Willoughby	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Intuitive Surgical, Inc.

Meeting Date: 05/01/2025

Record Date: 03/03/2025

Primary Security ID: 46120E602

Country: USA

Meeting Type: Annual

Ticker: ISRG

Shares Voted: 1,697

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Craig H. Barratt	Mgmt	For	For	For
1b	Elect Director Joseph C. Beery	Mgmt	For	For	For
1c	Elect Director Lewis Chew	Mgmt	For	For	For
1d	Elect Director Gary S. Guthart	Mgmt	For	For	For
1e	Elect Director Amal M. Johnson	Mgmt	For	For	For
1f	Elect Director Sreelakshmi Kolli	Mgmt	For	For	For
1g	Elect Director Amy L. Ladd	Mgmt	For	For	For

Intuitive Surgical, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Keith R. Leonard, Jr.	Mgmt	For	For	For
1i	Elect Director Jami Dover Nachtsheim	Mgmt	For	For	For
1j	Elect Director Monica P. Reed	Mgmt	For	For	For
1k	Elect Director David J. Rosa	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Improve Executive Compensation Program	SH	Against	Against	Against
6	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Kimberly-Clark Corporation

Meeting Date: 05/01/2025

Country: USA

Ticker: KMB

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 494368103

Shares Voted: 1,581

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Sylvia M. Burwell	Mgmt	For	For	For
1.2	Elect Director John W. Culver	Mgmt	For	For	For
1.3	Elect Director Michael D. Hsu	Mgmt	For	For	For
1.4	Elect Director Mae C. Jemison	Mgmt	For	For	For
1.5	Elect Director Deeptha Khanna	Mgmt	For	For	For
1.6	Elect Director S. Todd Maclin	Mgmt	For	For	For
1.7	Elect Director Deirdre A. Mahlan	Mgmt	For	For	For
1.8	Elect Director Sherilyn S. McCoy	Mgmt	For	For	For
1.9	Elect Director Christa S. Quarles	Mgmt	For	For	For
1.10	Elect Director Jaime A. Ramirez	Mgmt	For	For	For
1.11	Elect Director Joseph Romanelli	Mgmt	For	For	For
1.12	Elect Director Dunia A. Shive	Mgmt	For	For	For
1.13	Elect Director Mark T. Smucker	Mgmt	For	For	For

## Kimberly-Clark Corporation

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

## Mettler-Toledo International Inc.

Meeting Date: 05/01/2025Country: USATicker: MTD

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

Primary Security ID: 592688105

Shares Voted: 97					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Roland Diggelmann	Mgmt	For	For	For
1.2	Elect Director Domitille Doat-Le Bigot	Mgmt	For	For	For
1.3	Elect Director Elisha W. Finney	Mgmt	For	For	For
1.4	Elect Director Michael A. Kelly	Mgmt	For	For	For
1.5	Elect Director Thomas P. Salice	Mgmt	For	For	For
1.6	Elect Director Brian Shepherd	Mgmt	For	For	For
1.7	Elect Director Wolfgang Wienand	Mgmt	For	For	For
1.8	Elect Director Ingrid Zhang	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

## NRG Energy, Inc.

Meeting Date: 05/01/2025Country: USATicker: NRG

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

Primary Security ID: 629377508

Shares Voted: 959					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director E. Spencer Abraham	Mgmt	For	For	For
1b	Elect Director Antonio Carrillo	Mgmt	For	For	For

NRG Energy, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Matthew Carter, Jr.	Mgmt	For	For	For
1d	Elect Director Lawrence S. Coben	Mgmt	For	For	For
1e	Elect Director Heather Cox	Mgmt	For	For	For
1f	Elect Director Elisabeth B. Donohue	Mgmt	For	For	For
1g	Elect Director Marwan Fawaz	Mgmt	For	For	For
1h	Elect Director Kevin T. Howell	Mgmt	For	For	For
1i	Elect Director Alexander Pourbaix	Mgmt	For	For	For
1j	Elect Director Alexandra Pruner	Mgmt	For	For	For
1k	Elect Director Marcie C. Zlotnik	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirements and Eliminate Related Obsolete References	Mgmt	For	For	For

RTX Corporation

Meeting Date: 05/01/2025

Record Date: 03/04/2025

Primary Security ID: 75513E101

Country: USA

Meeting Type: Annual

Ticker: RTX

Shares Voted: 6,353

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Tracy A. Atkinson	Mgmt	For	For	For
1b	Elect Director Christopher T. Calio	Mgmt	For	For	For
1c	Elect Director Leanne G. Caret	Mgmt	For	For	For
1d	Elect Director Bernard A. Harris, Jr.	Mgmt	For	For	For
1e	Elect Director George R. Oliver	Mgmt	For	For	For
1f	Elect Director Ellen M. Pawlikowski	Mgmt	For	For	For
1g	Elect Director Denise L. Ramos	Mgmt	For	For	For
1h	Elect Director Fredric G. Reynolds	Mgmt	For	For	For
1i	Elect Director Brian C. Rogers	Mgmt	For	For	For



## RTX Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director James A. Winnefeld, Jr.	Mgmt	For	For	For
1k	Elect Director Robert O. Work	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	Against	Against

## CMS Energy Corporation

Meeting Date: 05/02/2025

Country: USA

Ticker: CMS

Record Date: 03/04/2025

Meeting Type: Annual

Primary Security ID: 125896100

Shares Voted: 1,423

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Deborah H. Butler	Mgmt	For	For	For
1b	Elect Director Kurt L. Darrow	Mgmt	For	For	For
1c	Elect Director Ralph Izzo	Mgmt	For	For	For
1d	Elect Director Garrick J. Rochow	Mgmt	For	For	For
1e	Elect Director John G. Russell	Mgmt	For	For	For
1f	Elect Director Suzanne F. Shank	Mgmt	For	For	For
1g	Elect Director Myrna M. Soto	Mgmt	For	For	For
1h	Elect Director John G. Sznewajs	Mgmt	For	For	For
1i	Elect Director Ronald J. Tanski	Mgmt	For	For	For
1j	Elect Director Laura H. Wright	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

Dover Corporation

Meeting Date: 05/02/2025

Record Date: 03/10/2025

Primary Security ID: 260003108

Country: USA

Meeting Type: Annual

Ticker: DOV

Shares Voted: 661

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Deborah L. DeHaas	Mgmt	For	For	For
1b	Elect Director H. John Gilbertson, Jr.	Mgmt	For	For	For
1c	Elect Director Kristiane C. Graham	Mgmt	For	For	For
1d	Elect Director Marc A. Howze	Mgmt	For	For	For
1e	Elect Director Michael Manley	Mgmt	For	For	For
1f	Elect Director Danita K. Ostling	Mgmt	For	For	For
1g	Elect Director Eric A. Spiegel	Mgmt	For	For	For
1h	Elect Director Richard J. Tobin	Mgmt	For	For	For
1i	Elect Director Keith E. Wandell	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For

Entergy Corporation

Meeting Date: 05/02/2025

Record Date: 03/07/2025

Primary Security ID: 29364G103

Country: USA

Meeting Type: Annual

Ticker: ETR

Shares Voted: 2,085

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gina F. Adams	Mgmt	For	For	For
1b	Elect Director John H. Black	Mgmt	For	For	For
1c	Elect Director John R. Burbank	Mgmt	For	For	For
1d	Elect Director Kirkland H. Donald	Mgmt	For	For	For
1e	Elect Director Brian W. Ellis	Mgmt	For	For	For
1f	Elect Director Philip L. Frederickson	Mgmt	For	For	For

Entergy Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director M. Elise Hyland	Mgmt	For	For	For
1h	Elect Director Stuart L. Levenick	Mgmt	For	For	For
1i	Elect Director Andrew S. Marsh	Mgmt	For	For	For
1j	Elect Director Karen A. Puckett	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Illinois Tool Works Inc.

Meeting Date: 05/02/2025

Record Date: 03/03/2025

Primary Security ID: 452308109

Country: USA

Meeting Type: Annual

Ticker: ITW

Shares Voted: 1,404

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel J. Brutto	Mgmt	For	For	For
1b	Elect Director Susan Crown	Mgmt	For	For	For
1c	Elect Director Darrell L. Ford	Mgmt	For	For	For
1d	Elect Director Kelly J. Grier	Mgmt	For	For	For
1e	Elect Director James W. Griffith	Mgmt	For	For	For
1f	Elect Director Jay L. Henderson	Mgmt	For	For	For
1g	Elect Director Jaime Irick	Mgmt	For	For	For
1h	Elect Director Richard H. Lenny	Mgmt	For	For	For
1i	Elect Director Christopher A. O'Herlihy	Mgmt	For	For	For
1j	Elect Director E. Scott Santi	Mgmt	For	For	For
1k	Elect Director David B. Smith, Jr.	Mgmt	For	For	For
1l	Elect Director Pamela B. Strobel	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Leidos Holdings, Inc.

Meeting Date: 05/02/2025

Record Date: 03/05/2025

Primary Security ID: 525327102

Country: USA

Meeting Type: Annual

Ticker: LDOS

Shares Voted: 620

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas A. Bell	Mgmt	For	For	For
1b	Elect Director Gregory R. Dahlberg	Mgmt	For	For	For
1c	Elect Director David G. Fubini	Mgmt	For	For	For
1d	Elect Director Noel B. Geer	Mgmt	For	For	For
1e	Elect Director Tina W. Jonas	Mgmt	For	For	For
1f	Elect Director Harry M. J. Kraemer, Jr.	Mgmt	For	For	For
1g	Elect Director Gary S. May	Mgmt	For	For	For
1h	Elect Director Nancy A. Norton	Mgmt	For	For	For
1i	Elect Director Patrick M. Shanahan	Mgmt	For	For	For
1j	Elect Director Robert S. Shapard	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Limit the Liability of Officers	Mgmt	For	For	For

Occidental Petroleum Corporation

Meeting Date: 05/02/2025

Record Date: 03/10/2025

Primary Security ID: 674599105

Country: USA

Meeting Type: Annual

Ticker: OXY

Shares Voted: 10

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vicky A. Bailey	Mgmt	For	For	For
1b	Elect Director Andrew Gould	Mgmt	For	For	For
1c	Elect Director Carlos M. Gutierrez	Mgmt	For	For	For

Occidental Petroleum Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Vicki Hollub	Mgmt	For	For	For
1e	Elect Director William R. Klesse	Mgmt	For	For	For
1f	Elect Director Jack B. Moore	Mgmt	For	For	For
1g	Elect Director Claire O'Neill	Mgmt	For	For	For
1h	Elect Director Avedick B. Poladian	Mgmt	For	For	For
1i	Elect Director Kenneth B. Robinson	Mgmt	For	For	For
1j	Elect Director Robert M. Shearer	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Smurfit WestRock Plc

Meeting Date: 05/02/2025Country: IrelandTicker: SW

Record Date: 03/10/2025Meeting Type: Annual

Primary Security ID: G8267P108

Shares Voted: 2,425

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Irial Finan	Mgmt	For	For	For
1.2	Elect Director Anthony Smurfit	Mgmt	For	For	For
1.3	Elect Director Ken Bowles	Mgmt	For	For	For
1.4	Elect Director Colleen F. Arnold	Mgmt	For	For	For
1.5	Elect Director Timothy J. Bernlohr	Mgmt	For	For	For
1.6	Elect Director Carole L. Brown	Mgmt	For	For	For
1.7	Elect Director Terrell K. Crews	Mgmt	For	For	For
1.8	Elect Director Carol Fairweather	Mgmt	For	For	For
1.9	Elect Director Mary Lynn Ferguson-McHugh	Mgmt	For	For	For
1.10	Elect Director Suzan F. Harrison	Mgmt	For	For	For
1.11	Elect Director Kaisa Hietala	Mgmt	For	For	For
1.12	Elect Director Lourdes Melgar	Mgmt	For	For	For

Smurfit WestRock Plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.13	Elect Director Jorgen Buhl Rasmussen	Mgmt	For	For	For
1.14	Elect Director Alan D. Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4a	Ratify KPMG as Auditors	Mgmt	For	For	For
4b	Authorize Board to Fix Remuneration of Auditors	Mgmt	For	For	For
5	Authorize Issue of Equity	Mgmt	For	For	For
6	Authorize Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
7	Determine Price Range at which Company can Re-issue Treasury Shares	Mgmt	For	For	For

Berkshire Hathaway Inc.

Meeting Date: 05/03/2025	Country: USA	Ticker: BRK.B
Record Date: 03/05/2025	Meeting Type: Annual	
Primary Security ID: 084670702		

Shares Voted: 6,338

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Warren E. Buffett	Mgmt	For	For	For
1.2	Elect Director Gregory E. Abel	Mgmt	For	For	For
1.3	Elect Director Howard G. Buffett	Mgmt	For	For	For
1.4	Elect Director Susan A. Buffett	Mgmt	For	For	For
1.5	Elect Director Stephen B. Burke	Mgmt	For	Withhold	Withhold
1.6	Elect Director Kenneth I. Chenault	Mgmt	For	Withhold	Withhold
1.7	Elect Director Christopher C. Davis	Mgmt	For	For	For
1.8	Elect Director Susan L. Decker	Mgmt	For	Withhold	Withhold
1.9	Elect Director Charlotte Guyman	Mgmt	For	Withhold	Withhold
1.10	Elect Director Ajit Jain	Mgmt	For	For	For
1.11	Elect Director Thomas S. Murphy, Jr.	Mgmt	For	Withhold	Withhold

Berkshire Hathaway Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.12	Elect Director Wallace R. Weitz	Mgmt	For	For	For
1.13	Elect Director Meryl B. Witmer	Mgmt	For	For	For
2	Report on Costs and Benefits of Voluntary Carbon Reduction Commitments	SH	Against	Against	Against
3	Report on Pay Disparity	SH	Against	Against	Against
4	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against	Against
5	Conduct and Report a Third-Party Racial Equity Audit on Risks Related to Race-based Initiatives	SH	Against	Against	Against
6	Designate Board Committee to Oversee DEI Strategy	SH	Against	Against	Against
7	Report on Clean Energy Supply Financing Ratio	SH	Against	Against	Against
8	Establish Board Committee on Artificial Intelligence	SH	Against	Against	Against

Cincinnati Financial Corporation

Meeting Date: 05/03/2025Country: USATicker: CINF

Record Date: 03/05/2025Meeting Type: Annual

Primary Security ID: 172062101

Shares Voted: 718

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nancy C. Benacci	Mgmt	For	For	For
1.2	Elect Director Linda W. Clement-Holmes	Mgmt	For	For	For
1.3	Elect Director Dirk J. Debbink	Mgmt	For	For	For
1.4	Elect Director Steven J. Johnston	Mgmt	For	For	For
1.5	Elect Director Jill P. Meyer	Mgmt	For	For	For
1.6	Elect Director David P. Osborn	Mgmt	For	For	For
1.7	Elect Director Gretchen W. Schar	Mgmt	For	For	For
1.8	Elect Director Charles O. Schiff	Mgmt	For	For	For
1.9	Elect Director Douglas S. Skidmore	Mgmt	For	For	For
1.10	Elect Director Stephen M. Spray	Mgmt	For	For	For
1.11	Elect Director John F. Steele, Jr.	Mgmt	For	For	For

Cincinnati Financial Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.12	Elect Director Larry R. Webb	Mgmt	For	For	For
1.13	Elect Director Cheng-sheng Peter Wu	Mgmt	For	For	For
2	Reduce Supermajority Vote Requirement	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Aflac Incorporated

Meeting Date: 05/05/2025

Country: USA

Ticker: AFL

Record Date: 02/25/2025

Meeting Type: Annual

Primary Security ID: 001055102

Shares Voted: 2,370

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel P. Amos	Mgmt	For	For	For
1b	Elect Director W. Paul Bowers	Mgmt	For	For	For
1c	Elect Director Arthur R. Collins	Mgmt	For	For	For
1d	Elect Director Miwako Hosoda	Mgmt	For	For	For
1e	Elect Director Michael A. Forrester	Mgmt	For	For	For
1f	Elect Director Thomas J. Kenny	Mgmt	For	For	For
1g	Elect Director Georgette D. Kiser	Mgmt	For	For	For
1h	Elect Director Karole F. Lloyd	Mgmt	For	For	For
1i	Elect Director Nobuchika Mori	Mgmt	For	For	For
1j	Elect Director Joseph L. Moskowitz	Mgmt	For	For	For
1k	Elect Director Katherine T. Rohrer	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For



Carvana Co.

Meeting Date: 05/05/2025

Record Date: 03/10/2025

Primary Security ID: 146869102

Country: USA

Meeting Type: Annual

Ticker: CVNA

Shares Voted: 555

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Dan Quayle	Mgmt	For	Withhold	Withhold
1.2	Elect Director Gregory Sullivan	Mgmt	For	Withhold	Withhold
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Amend Certificate of Incorporation to Eliminate the Personal Liability of Certain Officers	Mgmt	For	Against	Against
5	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For	For
6	Adopt Simple Majority Vote	SH	Against	For	For

Eli Lilly and Company

Meeting Date: 05/05/2025

Record Date: 02/26/2025

Primary Security ID: 532457108

Country: USA

Meeting Type: Annual

Ticker: LLY

Shares Voted: 4,030

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ralph Alvarez	Mgmt	For	For	For
1b	Elect Director Mary Lynne Hedley	Mgmt	For	For	For
1c	Elect Director Kimberly H. Johnson	Mgmt	For	For	For
1d	Elect Director Juan R. Luciano	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Declassify the Board of Directors	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For

## Uber Technologies, Inc.

Meeting Date: 05/05/2025

Country: USA

Ticker: UBER

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 90353T100

Shares Voted: 9,983

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ronald Sugar	Mgmt	For	For	For
1b	Elect Director Revathi Advaiti	Mgmt	For	For	For
1c	Elect Director Turqi Alnowaiser	Mgmt	For	For	For
1d	Elect Director Ursula Burns	Mgmt	For	For	For
1e	Elect Director Robert Eckert	Mgmt	For	For	For
1f	Elect Director Amanda Ginsberg	Mgmt	For	For	For
1g	Elect Director Dara Khosrowshahi	Mgmt	For	For	For
1h	Elect Director John Thain	Mgmt	For	For	For
1i	Elect Director David Trujillo	Mgmt	For	For	For
1j	Elect Director Alexander Wynaendts	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Baxter International Inc.

Meeting Date: 05/06/2025

Country: USA

Ticker: BAX

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 071813109

Shares Voted: 70

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William A. Ampofo, II	Mgmt	For	For	For
1b	Elect Director Jeffrey A. Craig	Mgmt	For	For	For
1c	Elect Director Patricia B. Morrison	Mgmt	For	For	For
1d	Elect Director Stephen N. Oesterle	Mgmt	For	For	For
1e	Elect Director Stephen H. Rusckowski	Mgmt	For	For	For

Baxter International Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Nancy M. Schlichting	Mgmt	For	For	For
1g	Elect Director Brent Shafer	Mgmt	For	For	For
1h	Elect Director Cathy R. Smith	Mgmt	For	For	For
1i	Elect Director Amy A. Wendell	Mgmt	For	For	For
1j	Elect Director David S. Wilkes	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Adopt Share Retention Policy For Senior Executives	SH	Against	For	For

Bristol-Myers Squibb Company

Meeting Date: 05/06/2025

Record Date: 03/14/2025

Primary Security ID: 110122108

Country: USA

Meeting Type: Annual

Ticker: BMY

Shares Voted: 10,026					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Peter J. Arduini	Mgmt	For	For	For
1B	Elect Director Deepak L. Bhatt	Mgmt	For	For	For
1C	Elect Director Christopher S. Boerner	Mgmt	For	For	For
1D	Elect Director Julia A. Haller	Mgmt	For	For	For
1E	Elect Director Manuel Hidalgo Medina	Mgmt	For	For	For
1F	Elect Director Michael R. McMullen	Mgmt	For	For	For
1G	Elect Director Paula A. Price	Mgmt	For	For	For
1H	Elect Director Derica W. Rice	Mgmt	For	For	For
1I	Elect Director Theodore R. Samuels	Mgmt	For	For	For
1J	Elect Director Karen H. Vousden	Mgmt	For	For	For
1K	Elect Director Phyllis R. Yale	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Bristol-Myers Squibb Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Establish a Board Committee on Corporate Financial Sustainability	SH	Against	Against	Against
5	Consider Abolishing DEI Goals	SH	Against	Against	Against

Cboe Global Markets, Inc.

Meeting Date: 05/06/2025

Record Date: 03/18/2025

Primary Security ID: 12503M108

Country: USA

Meeting Type: Annual

Ticker: CBOE

Shares Voted: 504					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director William M. Farrow, III	Mgmt	For	For	For
1b	Elect Director Fredric J. Tomczyk	Mgmt	For	For	For
1c	Elect Director Edward J. Fitzpatrick	Mgmt	For	For	For
1d	Elect Director Ivan K. Fong	Mgmt	For	For	For
1e	Elect Director Janet P. Froetscher	Mgmt	For	For	For
1f	Elect Director Jill R. Goodman	Mgmt	For	For	For
1g	Elect Director Erin A. Mansfield	Mgmt	For	For	For
1h	Elect Director Cecilia H. Mao	Mgmt	For	For	For
1i	Elect Director Alexander J. Matturri, Jr.	Mgmt	For	For	For
1j	Elect Director Jennifer J. McPeck	Mgmt	For	For	For
1k	Elect Director Roderick A. Palmore	Mgmt	For	For	For
1l	Elect Director James E. Parisi	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Political Contributions	SH	Against	For	For

## CF Industries Holdings, Inc.

Meeting Date: 05/06/2025

Record Date: 03/13/2025

Primary Security ID: 125269100

Country: USA

Meeting Type: Annual

Ticker: CF

Shares Voted: 876

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Javed Ahmed	Mgmt	For	For	For
1b	Elect Director Robert C. Arzbaecher	Mgmt	For	For	For
1c	Elect Director Christopher D. Bohn	Mgmt	For	For	For
1d	Elect Director Deborah L. DeHaas	Mgmt	For	For	For
1e	Elect Director John W. Eaves	Mgmt	For	For	For
1f	Elect Director Susan A. Ellerbusch	Mgmt	For	For	For
1g	Elect Director Stephen J. Hagge	Mgmt	For	For	For
1h	Elect Director Jesus Madrazo Yris	Mgmt	For	For	For
1i	Elect Director Anne P. Noonan	Mgmt	For	For	For
1j	Elect Director Michael J. Toelle	Mgmt	For	For	For
1k	Elect Director Theresa E. Wagler	Mgmt	For	For	For
1l	Elect Director Celso L. White	Mgmt	For	For	For
1m	Elect Director W. Anthony Will	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

## Danaher Corporation

Meeting Date: 05/06/2025

Record Date: 03/07/2025

Primary Security ID: 235851102

Country: USA

Meeting Type: Annual

Ticker: DHR

Shares Voted: 3,121

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rainer M. Blair	Mgmt	For	For	For
1b	Elect Director Feroz Dewan	Mgmt	For	For	For

Danaher Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Linda Filler	Mgmt	For	For	For
1d	Elect Director Charles W. Lamanna	Mgmt	For	For	For
1e	Elect Director Teri List	Mgmt	For	Against	Against
1f	Elect Director Jessica L. Mega	Mgmt	For	For	For
1g	Elect Director Mitchell P. Rales	Mgmt	For	For	For
1h	Elect Director Steven M. Rales	Mgmt	For	For	For
1i	Elect Director A. Shane Sanders	Mgmt	For	Against	Against
1j	Elect Director John T. Schwieters	Mgmt	For	Against	Against
1k	Elect Director Alan G. Spoon	Mgmt	For	For	For
1l	Elect Director Raymond C. Stevens	Mgmt	For	Against	Against
1m	Elect Director Elias A. Zerhouni	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Evergy, Inc.

Meeting Date: 05/06/2025

Country: USA

Ticker: EVRG

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 30034W106

Shares Voted: 1,099

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David A. Campbell	Mgmt	For	For	For
1b	Elect Director B. Anthony Isaac	Mgmt	For	For	For
1c	Elect Director Paul M. Keglevic	Mgmt	For	For	For
1d	Elect Director Mary L. Landrieu	Mgmt	For	For	For
1e	Elect Director Sandra A.J. Lawrence	Mgmt	For	For	For
1f	Elect Director Ann D. Murtlow	Mgmt	For	For	For
1g	Elect Director Dean A. Newton	Mgmt	For	For	For
1h	Elect Director Sandra J. Price	Mgmt	For	For	For
1i	Elect Director Jonathan D. Rolph	Mgmt	For	For	For

Evergy, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director James Scarola	Mgmt	For	For	For
1k	Elect Director Neal A. Sharma	Mgmt	For	For	For
1l	Elect Director C. John Wilder	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Expeditors International of Washington, Inc.

Meeting Date: 05/06/2025

Record Date: 03/11/2025

Primary Security ID: 302130109

Country: USA

Meeting Type: Annual

Ticker: EXPD

Shares Voted: 682

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Glenn M. Alger	Mgmt	For	For	For
1.2	Elect Director Robert "Bob" P. Carlile	Mgmt	For	For	For
1.3	Elect Director James "Jim" M. DuBois	Mgmt	For	Against	Against
1.4	Elect Director Mark A. Emmert	Mgmt	For	For	For
1.5	Elect Director Diane H. Gulyas	Mgmt	For	For	For
1.6	Elect Director Brandon S. Pedersen	Mgmt	For	Against	Against
1.7	Elect Director Liane J. Pelletier	Mgmt	For	For	For
1.8	Elect Director Olivia D. Polius	Mgmt	For	Against	Against
1.9	Elect Director Daniel R. Wall	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

GE Aerospace

Meeting Date: 05/06/2025

Record Date: 03/10/2025

Primary Security ID: 369604301

Country: USA

Meeting Type: Annual

Ticker: GE

Shares Voted: 5,270

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stephen Angel	Mgmt	For	For	For
1b	Elect Director Sebastien Bazin	Mgmt	For	For	For
1c	Elect Director Margaret Billson	Mgmt	For	For	For
1d	Elect Director H. Lawrence Culp, Jr.	Mgmt	For	For	For
1e	Elect Director Thomas Enders	Mgmt	For	For	For
1f	Elect Director Edward Garden	Mgmt	For	For	For
1g	Elect Director Isabella Goren	Mgmt	For	For	For
1h	Elect Director Thomas Horton	Mgmt	For	For	For
1i	Elect Director Catherine Lesjak	Mgmt	For	For	For
1j	Elect Director Darren McDew	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	Against	Against

Hubbell Incorporated

Meeting Date: 05/06/2025Country: USATicker: HUBB

Record Date: 03/07/2025Meeting Type: Annual

Primary Security ID: 443510607

Shares Voted: 249

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Gerben W. Bakker	Mgmt	For	For	For
1.2	Elect Director Carlos M. Cardoso	Mgmt	For	For	For
1.3	Elect Director Debra L. Dial	Mgmt	For	For	For
1.4	Elect Director Anthony J. Guzzi	Mgmt	For	For	For
1.5	Elect Director Rhett A. Hernandez	Mgmt	For	For	For
1.6	Elect Director Neal J. Keating	Mgmt	For	For	For
1.7	Elect Director Bonnie C. Lind	Mgmt	For	For	For



Hubbell Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director John F. Malloy	Mgmt	For	For	For
1.9	Elect Director Jennifer M. Pollino	Mgmt	For	For	For
1.10	Elect Director Garrick J. Rochow	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Adopt Majority Voting for Uncontested Election of Directors	Mgmt	For	For	For
5	Amend Omnibus Stock Plan	Mgmt	For	For	For

Intel Corporation

Meeting Date: 05/06/2025Country: USATicker: INTC

Record Date: 03/10/2025Meeting Type: Annual

Primary Security ID: 458140100

Shares Voted: 21,025					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director James J. Goetz	Mgmt	For	For	For
1b	Elect Director Andrea J. Goldsmith	Mgmt	For	For	For
1c	Elect Director Alyssa H. Henry	Mgmt	For	For	For
1d	Elect Director Eric Meurice	Mgmt	For	For	For
1e	Elect Director Barbara G. Novick	Mgmt	For	For	For
1f	Elect Director Steve Sanghi	Mgmt	For	For	For
1g	Elect Director Gregory D. Smith	Mgmt	For	For	For
1h	Elect Director Stacy J. Smith	Mgmt	For	For	For
1i	Elect Director Lip-Bu Tan	Mgmt	For	For	For
1j	Elect Director Dion J. Weisler	Mgmt	For	For	For
1k	Elect Director Frank D. Yeary	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against

Intel Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Report on Ethical Impact Assessment	SH	Against	Against	Against
6	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against
7	Provide Right to Act by Written Consent	SH	Against	For	For

NVR, Inc.

Meeting Date: 05/06/2025

Record Date: 03/05/2025

Primary Security ID: 62944T105

Country: USA

Meeting Type: Annual

Ticker: NVR

Shares Voted: 14					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paul C. Saville	Mgmt	For	For	For
1b	Elect Director C. E. Andrews	Mgmt	For	For	For
1c	Elect Director Sallie B. Bailey	Mgmt	For	For	For
1d	Elect Director Alfred E. Festa	Mgmt	For	For	For
1e	Elect Director Alexandra A. Jung	Mgmt	For	For	For
1f	Elect Director Mel Martinez	Mgmt	For	For	For
1g	Elect Director David A. Preiser	Mgmt	For	For	For
1h	Elect Director W. Grady Rosier	Mgmt	For	For	For
1i	Elect Director Susan Williamson Ross	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Pentair plc

Meeting Date: 05/06/2025

Record Date: 03/07/2025

Primary Security ID: G7S00T104

Country: Ireland

Meeting Type: Annual

Ticker: PNR

Shares Voted: 765

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mona Abutaleb Stephenson	Mgmt	For	For	For
1b	Elect Director Melissa Barra	Mgmt	For	For	For
1c	Elect Director Tracey C. Doi	Mgmt	For	For	For
1d	Elect Director T. Michael Glenn	Mgmt	For	For	For
1e	Elect Director Theodore L. Harris	Mgmt	For	For	For
1f	Elect Director David A. Jones	Mgmt	For	For	For
1g	Elect Director Gregory E. Knight	Mgmt	For	For	For
1h	Elect Director Michael T. Speetzen	Mgmt	For	For	For
1i	Elect Director John L. Stauch	Mgmt	For	For	For
1j	Elect Director Billie I. Williamson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Deloitte & Touche LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
4	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For	For
5	Renew the Board's Authority to Opt-Out of Statutory Preemption Rights Under Irish Law	Mgmt	For	For	For
6	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For

Meeting Date: 05/06/2025

Record Date: 03/07/2025

Primary Security ID: 427866108

Country: USA

Meeting Type: Annual

Ticker: HSY

Shares Voted: 20

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michele G. Buck	Mgmt	For	For	For
1b	Elect Director Timothy W. Curoe	Mgmt	For	For	For

## The Hershey Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Mary Kay Haben	Mgmt	For	For	For
1d	Elect Director Huang Maria T. Kraus	Mgmt	For	Against	Against
1e	Elect Director Deirdre A. Mahlan	Mgmt	For	For	For
1f	Elect Director Barry J. Nalebuff	Mgmt	For	For	For
1g	Elect Director Kevin M. Ozan	Mgmt	For	For	For
1h	Elect Director Juan R. Perez	Mgmt	For	Against	Against
1i	Elect Director Marie Quintero-Johnson	Mgmt	For	For	For
1j	Elect Director Cordel Robbin-Coker	Mgmt	For	For	For
1k	Elect Director Harold Singleton, III	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Amend Certificate of Incorporation re: Stockholders' Right to Fill Vacancies	Mgmt	For	For	For

## Tyler Technologies, Inc.

Meeting Date: 05/06/2025	Country: USA	Ticker: TYL
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 902252105		

Shares Voted: 203

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Glenn A. Carter	Mgmt	For	For	For
1.2	Elect Director Margot L. Carter	Mgmt	For	For	For
1.3	Elect Director Brenda A. Cline	Mgmt	For	For	For
1.4	Elect Director Ronnie D. Hawkins, Jr.	Mgmt	For	For	For
1.5	Elect Director John S. Marr, Jr.	Mgmt	For	For	For
1.6	Elect Director H. Lynn Moore, Jr.	Mgmt	For	For	For
1.7	Elect Director Daniel M. Pope	Mgmt	For	For	For
1.8	Elect Director Andrew D. Teed	Mgmt	For	For	For

Tyler Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Political Contributions	SH	Against	Against	Against
5a	Eliminate Supermajority Vote Requirement in Article Ninth of the Certificate	Mgmt	For	For	For
5b	Eliminate Supermajority Vote Requirement in Article Twelfth of the Certificate	Mgmt	For	For	For
6	Amend Right to Act by Written Consent	Mgmt	For	For	For

Valero Energy Corporation

Meeting Date: 05/06/2025	Country: USA	Ticker: VLO
Record Date: 03/10/2025	Meeting Type: Annual	
Primary Security ID: 91913Y100		

Shares Voted: 1,512					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Fred M. Diaz	Mgmt	For	For	For
1b	Elect Director H. Paulett Eberhart	Mgmt	For	For	For
1c	Elect Director Marie A. Ffolkes	Mgmt	For	For	For
1d	Elect Director Kimberly S. Greene	Mgmt	For	For	For
1e	Elect Director Deborah P. Majoras	Mgmt	For	For	For
1f	Elect Director Eric D. Mullins	Mgmt	For	For	For
1g	Elect Director R. Lane Riggs	Mgmt	For	For	For
1h	Elect Director Randall J. Weisenburger	Mgmt	For	For	For
1i	Elect Director Rayford Wilkins, Jr.	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

West Pharmaceutical Services, Inc.

Meeting Date: 05/06/2025

Record Date: 02/28/2025

Primary Security ID: 955306105

Country: USA

Meeting Type: Annual

Ticker: WST

Shares Voted: 345

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Buthman	Mgmt	For	For	For
1b	Elect Director William F. Feehery	Mgmt	For	For	For
1c	Elect Director Robert F. Friel	Mgmt	For	For	For
1d	Elect Director Eric M. Green	Mgmt	For	For	For
1e	Elect Director Janet B. Haugen	Mgmt	For	For	For
1f	Elect Director Thomas W. Hofmann	Mgmt	For	For	For
1g	Elect Director Molly E. Joseph	Mgmt	For	For	For
1h	Elect Director Deborah L. V. Keller	Mgmt	For	For	For
1i	Elect Director Myla P. Lai-Goldman	Mgmt	For	For	For
1j	Elect Director Stephen H. Lockhart	Mgmt	For	For	For
1k	Elect Director Douglas A. Michels	Mgmt	For	For	For
1l	Elect Director Paolo Pucci	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Provide Right to Call Special Meeting	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

AMETEK, Inc.

Meeting Date: 05/07/2025

Record Date: 03/10/2025

Primary Security ID: 031100100

Country: USA

Meeting Type: Annual

Ticker: AME

Shares Voted: 1,120

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Dean Seavers	Mgmt	For	For	For
1b	Elect Director David A. Zapico	Mgmt	For	For	For

AMETEK, Inc.

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

Arch Capital Group Ltd.

Meeting Date: 05/07/2025Country: BermudaTicker: AGL

Record Date: 03/12/2025Meeting Type: Annual

Primary Security ID: G0450A105

Shares Voted: 1,752					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John L. Bunce, Jr.	Mgmt	For	For	For
1b	Elect Director Moira Kilcoyne	Mgmt	For	For	For
1c	Elect Director Alexander Moczarski	Mgmt	For	For	For
1d	Elect Director Nicolas Papadopoulos	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4a	Elect Director Brian Chen as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4b	Elect Director Crystal Doughty as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4c	Elect Director Matthew Dragonetti as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4d	Elect Director Seamus Fearon as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4e	Elect Director Jerome Halgan as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4f	Elect Director Chris Hovey as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For

Arch Capital Group Ltd.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4g	Elect Director Francois Morin as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4h	Elect Director David J. Mulholland as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4i	Elect Director Chiara Nannini as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4j	Elect Director Maamoun Rajeh as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4k	Elect Director William Soares as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4l	Elect Director Alan Tiernan as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
4m	Elect Director Christine Todd as Designated Company Director of Non-U.S. Subsidiaries	Mgmt	For	For	For
5	Report on Effectiveness of Diversity, Equity, and Inclusion Efforts	SH	Against	Against	Against

Brown & Brown, Inc.

Meeting Date: 05/07/2025

Country: USA

Ticker: BRO

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 115236101

Shares Voted: 1,148					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director J. Hyatt Brown	Mgmt	For	For	For
1.2	Elect Director J. Powell Brown	Mgmt	For	For	For
1.3	Elect Director Lawrence L. Gellerstedt, III	Mgmt	For	For	For
1.4	Elect Director Theodore J. Hoepner	Mgmt	For	For	For
1.5	Elect Director James S. Hunt	Mgmt	For	For	For
1.6	Elect Director Toni Jennings	Mgmt	For	For	For
1.7	Elect Director Paul J. Krump	Mgmt	For	For	For



Brown & Brown, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Timothy R.M. Main	Mgmt	For	For	For
1.9	Elect Director Bronislaw E. Masojada	Mgmt	For	For	For
1.10	Elect Director Jaymin B. Patel	Mgmt	For	For	For
1.11	Elect Director H. Palmer Proctor, Jr.	Mgmt	For	For	For
1.12	Elect Director Wendell S. Reilly	Mgmt	For	For	For
1.13	Elect Director Kathleen A. Savio	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

CSX Corporation

Meeting Date: 05/07/2025

Country: USA

Ticker: CSX

Record Date: 03/07/2025

Meeting Type: Annual

Primary Security ID: 126408103

Shares Voted: 9,460					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ann D. Begeman	Mgmt	For	For	For
1b	Elect Director Thomas P. Bostick	Mgmt	For	For	For
1c	Elect Director Anne H. Chow	Mgmt	For	For	For
1d	Elect Director Steven T. Halverson	Mgmt	For	For	For
1e	Elect Director Paul C. Hilal	Mgmt	For	For	For
1f	Elect Director Joseph R. Hinrichs	Mgmt	For	For	For
1g	Elect Director David M. Moffett	Mgmt	For	For	For
1h	Elect Director Linda H. Riefler	Mgmt	For	For	For
1i	Elect Director Suzanne M. Vautrinot	Mgmt	For	For	For
1j	Elect Director James L. Wainscott	Mgmt	For	For	For
1k	Elect Director J. Steven Whisler	Mgmt	For	For	For
1l	Elect Director John J. Zillmer	Mgmt	For	For	For

CSX Corporation

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

Dominion Energy, Inc.

Meeting Date: 05/07/2025Country: USATicker: D

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 25746U109

Shares Voted: 4,032

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director James A. Bennett	Mgmt	For	For	For
1B	Elect Director Robert M. Blue	Mgmt	For	For	For
1C	Elect Director Paul M. Dabbar	Mgmt	For	For	For
1D	Elect Director D. Maybank Hagood	Mgmt	For	For	For
1E	Elect Director Mark J. Kington	Mgmt	For	For	For
1F	Elect Director Kristin G. Lovejoy	Mgmt	For	For	For
1G	Elect Director Joseph M. Rigby	Mgmt	For	For	For
1H	Elect Director Pamela J. Royal	Mgmt	For	For	For
1I	Elect Director Robert H. Spilman, Jr.	Mgmt	For	For	For
1J	Elect Director Susan N. Story	Mgmt	For	For	For
1K	Elect Director Vanessa Allen Sutherland	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Consider Eliminating Non-Carbon Emitting Generation Goals in Executive Pay Incentives	SH	Against	Against	Against

# General Dynamics Corporation

Meeting Date: 05/07/2025

Country: USA

Ticker: GD

Record Date: 03/12/2025

Meeting Type: Annual

Primary Security ID: 369550108

Shares Voted: 1,101

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard D. Clarke	Mgmt	For	For	For
1b	Elect Director Rudy F. deLeon	Mgmt	For	For	For
1c	Elect Director Cecil D. Haney	Mgmt	For	For	For
1d	Elect Director Charles W. Hooper	Mgmt	For	For	For
1e	Elect Director Mark M. Malcolm	Mgmt	For	For	For
1f	Elect Director James N. Mattis	Mgmt	For	For	For
1g	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1h	Elect Director C. Howard Nye	Mgmt	For	For	For
1i	Elect Director Catherine B. Reynolds	Mgmt	For	For	For
1j	Elect Director Laura J. Schumacher	Mgmt	For	For	For
1k	Elect Director Robert K. Steel	Mgmt	For	For	For
1l	Elect Director John G. Stratton	Mgmt	For	For	For
1m	Elect Director Peter A. Wall	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Human Rights Impact Assessment	SH	Against	Against	Against

# Gilead Sciences, Inc.

Meeting Date: 05/07/2025

Country: USA

Ticker: GILD

Record Date: 03/14/2025

Meeting Type: Annual

Primary Security ID: 375558103

Shares Voted: 6,146

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jacqueline K. Barton	Mgmt	For	For	For
1b	Elect Director Jeffrey A. Bluestone	Mgmt	For	For	For

Gilead Sciences, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Sandra J. Horning	Mgmt	For	For	For
1d	Elect Director Kelly A. Kramer	Mgmt	For	For	For
1e	Elect Director Ted W. Love	Mgmt	For	For	For
1f	Elect Director Harish M. Manwani	Mgmt	For	For	For
1g	Elect Director Daniel P. O'Day	Mgmt	For	For	For
1h	Elect Director Javier J. Rodriguez	Mgmt	For	For	For
1i	Elect Director Anthony Walters	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Pay Disparity	SH	Against	Against	Against
5	Require Independent Board Chair	SH	Against	Against	Against
6	Adopt Comprehensive Human Rights Policy and Human Rights Due Diligence Process	SH	Against	For	For
7	Report on the Risks of DEI Practices for Contractors	SH	Against	Against	Against

IDEXX Laboratories, Inc.

Meeting Date: 05/07/2025

Country: USA

Ticker: IDXX

Record Date: 03/10/2025

Meeting Type: Annual

Primary Security ID: 45168D104

Shares Voted: 393

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stuart M. Essig	Mgmt	For	For	For
1b	Elect Director Jonathan J. Mazelsky	Mgmt	For	For	For
1c	Elect Director M. Anne Szostak	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For

IDEXX Laboratories, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Amend Certificate of Incorporation to Allow the Exculpation of Officers	Mgmt	For	For	For
6	Declassify the Board of Directors	SH	None	For	For

Packaging Corporation of America

Meeting Date: 05/07/2025Country: USATicker: PKG

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 695156109

Shares Voted: 435					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cheryl K. Beebe	Mgmt	For	For	For
1.2	Elect Director Duane C. Farrington	Mgmt	For	For	For
1.3	Elect Director Karen E. Gowland	Mgmt	For	For	For
1.4	Elect Director Donna A. Harman	Mgmt	For	For	For
1.5	Elect Director Mark W. Kowlzan	Mgmt	For	For	For
1.6	Elect Director Robert C. Lyons	Mgmt	For	For	For
1.7	Elect Director Samuel M. Mencoff	Mgmt	For	For	For
1.8	Elect Director Roger B. Porter	Mgmt	For	For	For
1.9	Elect Director Thomas S. Souleles	Mgmt	For	For	For
1.10	Elect Director Paul T. Stecko	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

PepsiCo, Inc.

Meeting Date: 05/07/2025Country: USATicker: PEP

Record Date: 02/27/2025Meeting Type: Annual

Primary Security ID: 713448108

Shares Voted: 6,525

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Segun Agbaje	Mgmt	For	For	For
1b	Elect Director Jennifer Bailey	Mgmt	For	For	For
1c	Elect Director Cesar Conde	Mgmt	For	For	For
1d	Elect Director Ian Cook	Mgmt	For	For	For
1e	Elect Director Edith W. Cooper	Mgmt	For	For	For
1f	Elect Director Susan M. Diamond	Mgmt	For	For	For
1g	Elect Director Dina Dublon	Mgmt	For	For	For
1h	Elect Director Michelle Gass	Mgmt	For	For	For
1i	Elect Director Ramon L. Laguarta	Mgmt	For	For	For
1j	Elect Director Dave J. Lewis	Mgmt	For	For	For
1k	Elect Director David C. Page	Mgmt	For	For	For
1l	Elect Director Robert C. Pohlad	Mgmt	For	For	For
1m	Elect Director Daniel Vasella	Mgmt	For	For	For
1n	Elect Director Darren Walker	Mgmt	For	For	For
1o	Elect Director Alberto Weisser	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Issue Third Party Assessment of Safety of Non-Sugar Sweeteners	SH	Against	Against	Against
5	Report on Third-Party Racial Equity Audit	SH	Against	Against	Against
6	Report on Risks Related to Biodiversity and Nature Loss	SH	Against	Against	Against
7	Report on Plastic Packaging	SH	Against	Against	Against

Meeting Date: 05/07/2025

Record Date: 03/14/2025

Primary Security ID: 718172109

Country: USA

Meeting Type: Annual

Ticker: PM

Shares Voted: 7,678

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Bonin Bough	Mgmt	For	For	For
1b	Elect Director Andre Calantzopoulos	Mgmt	For	For	For
1c	Elect Director Michel Combes	Mgmt	For	For	For
1d	Elect Director Werner Geissler	Mgmt	For	For	For
1e	Elect Director Victoria Harker	Mgmt	For	For	For
1f	Elect Director Lisa A. Hook	Mgmt	For	For	For
1g	Elect Director Kalpana Morparia	Mgmt	For	For	For
1h	Elect Director Jacek Olczak	Mgmt	For	For	For
1i	Elect Director Robert B. Polet	Mgmt	For	For	For
1j	Elect Director Dessi Temperley	Mgmt	For	For	For
1k	Elect Director Shlomo Yanai	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers SA as Auditors	Mgmt	For	For	For

Public Storage

Meeting Date: 05/07/2025Country: USATicker: PSA  
Record Date: 03/03/2025Meeting Type: Annual  
Primary Security ID: 74460D109

Shares Voted: 746

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ronald L. Havner, Jr.	Mgmt	For	For	For
1b	Elect Director Tamara Hughes Gustavson	Mgmt	For	For	For
1c	Elect Director Maria R. Hawthorne	Mgmt	For	For	For
1d	Elect Director Shankh S. Mitra	Mgmt	For	For	For
1e	Elect Director Rebecca Owen	Mgmt	For	For	For
1f	Elect Director Kristy M. Pipes	Mgmt	For	For	For
1g	Elect Director Avedick B. Poladian	Mgmt	For	For	For
1h	Elect Director John Reyes	Mgmt	For	For	For

Public Storage

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Joseph D. Russell, Jr.	Mgmt	For	For	For
1j	Elect Director Tariq M. Shaukat	Mgmt	For	For	For
1k	Elect Director Ronald P. Spogli	Mgmt	For	For	For
1l	Elect Director Paul S. Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	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: 1,528

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



Meeting Date: 05/07/2025

Record Date: 03/10/2025

Primary Security ID: 89400J107

Country: USA

Meeting Type: Annual

Ticker: TRU

Shares Voted: 945

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director George M. Awad	Mgmt	For	For	For
1b	Elect Director Christopher A. Cartwright	Mgmt	For	For	For
1c	Elect Director Suzanne P. Clark	Mgmt	For	For	For
1d	Elect Director Hamidou Dia	Mgmt	For	For	For
1e	Elect Director Russell P. Fradin	Mgmt	For	For	For
1f	Elect Director Charles E. Gottdiener	Mgmt	For	For	For
1g	Elect Director Pamela A. Joseph	Mgmt	For	For	For
1h	Elect Director Thomas L. Monahan, III	Mgmt	For	For	For
1i	Elect Director Ravi Kumar Singiseti	Mgmt	For	For	For
1j	Elect Director Linda K. Zukauckas	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Alnylam Pharmaceuticals, Inc.

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 02043Q107

Country: USA

Meeting Type: Annual

Ticker: ALNY

Shares Voted: 612

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carolyn R. Bertozzi	Mgmt	For	For	For
1b	Elect Director Margaret A. Hamburg	Mgmt	For	For	For
1c	Elect Director Colleen F. Reitan	Mgmt	For	For	For
1d	Elect Director Amy W. Schulman	Mgmt	For	For	For

Alnylam Pharmaceuticals, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Amend Certificate of Incorporation to Allow the Exculpation of Officers	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Ameren Corporation

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 023608102

Country: USA

Meeting Type: Annual

Ticker: AEE

Shares Voted: 1,283

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cynthia J. Brinkley	Mgmt	For	For	For
1b	Elect Director Catherine S. Brune	Mgmt	For	For	For
1c	Elect Director Ward H. Dickson	Mgmt	For	For	For
1d	Elect Director Noelle K. Eder *Withdrawn Resolution*	Mgmt			
1e	Elect Director Ellen M. Fitzsimmons	Mgmt	For	For	For
1f	Elect Director Rafael Flores	Mgmt	For	For	For
1g	Elect Director Kimberly J. Harris *Withdrawn Resolution*	Mgmt			
1h	Elect Director Richard J. Harshman	Mgmt	For	For	For
1i	Elect Director Craig S. Ivey	Mgmt	For	For	For
1j	Elect Director Steven H. Lipstein	Mgmt	For	For	For
1k	Elect Director Martin J. Lyons, Jr.	Mgmt	For	For	For
1l	Elect Director Leo S. Mackay, Jr.	Mgmt	For	For	For
1m	Elect Director Steven O. Vondran	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Ameren Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Disclose GHG Emissions Reductions Targets	SH	Against	Against	Against

## Archer-Daniels-Midland Company

Meeting Date: 05/08/2025	Country: USA	Ticker: ADM
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 039483102		

Shares Voted: 2,407					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael S. Burke	Mgmt	For	For	For
1b	Elect Director Theodore Colbert, III	Mgmt	For	For	For
1c	Elect Director James C. Collins, Jr.	Mgmt	For	For	For
1d	Elect Director Terrell K. Crews	Mgmt	For	For	For
1e	Elect Director Ellen de Brabander	Mgmt	For	For	For
1f	Elect Director Suzan F. Harrison	Mgmt	For	For	For
1g	Elect Director Juan R. Luciano	Mgmt	For	For	For
1h	Elect Director David R. McAtee, II	Mgmt	For	For	For
1i	Elect Director Patrick J. Moore	Mgmt	For	For	For
1j	Elect Director Debra A. Sandler	Mgmt	For	For	For
1k	Elect Director Lei Z. Schlitz	Mgmt	For	For	For
1l	Elect Director Kelvin R. Westbrook	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

## Avantor, Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: AVTR
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 05352A100		

Avantor, Inc.

Shares Voted: 387

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Juan Andres	Mgmt	For	For	For
1b	Elect Director John Carethers	Mgmt	For	For	For
1c	Elect Director Lan Kang	Mgmt	For	For	For
1d	Elect Director Dame Louise Makin	Mgmt	For	For	For
1e	Elect Director Joseph Massaro	Mgmt	For	For	For
1f	Elect Director Mala Murthy	Mgmt	For	For	For
1g	Elect Director Jonathan Peacock	Mgmt	For	For	For
1h	Elect Director Michael Severino	Mgmt	For	For	For
1i	Elect Director Michael Stubblefield	Mgmt	For	For	For
1j	Elect Director Gregory Summe	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Cadence Design Systems, Inc.

Meeting Date: 05/08/2025Country: USATicker: CDNS

Record Date: 03/10/2025Meeting Type: Annual

Primary Security ID: 127387108

Shares Voted: 1,318

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mark W. Adams	Mgmt	For	For	For
1.2	Elect Director Ita Brennan	Mgmt	For	For	For
1.3	Elect Director Lewis Chew	Mgmt	For	For	For
1.4	Elect Director Anirudh Devgan	Mgmt	For	For	For
1.5	Elect Director Moshe Gavrielov	Mgmt	For	For	For
1.6	Elect Director ML Krakauer	Mgmt	For	For	For
1.7	Elect Director Julia Liuson	Mgmt	For	For	For
1.8	Elect Director James D. Plummer	Mgmt	For	For	For
1.9	Elect Director Alberto Sangiovanni-Vincentelli	Mgmt	For	For	For

Cadence Design Systems, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Young K. Sohn	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on Political Contributions and Expenditures	SH	Against	For	For

Capital One Financial Corporation

Meeting Date: 05/08/2025	Country: USA	Ticker: COF
Record Date: 03/12/2025	Meeting Type: Annual	
Primary Security ID: 14040H105		

Shares Voted: 1,837

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard D. Fairbank	Mgmt	For	For	For
1b	Elect Director Ime Archibong	Mgmt	For	For	For
1c	Elect Director Christine Detrick	Mgmt	For	For	For
1d	Elect Director Ann Fritz Hackett	Mgmt	For	For	For
1e	Elect Director Suni P. Harford	Mgmt	For	For	For
1f	Elect Director Peter Thomas Killalea	Mgmt	For	For	For
1g	Elect Director Cornelis ("Eli") Leenaars	Mgmt	For	For	For
1h	Elect Director François Locoh-Donou	Mgmt	For	For	For
1i	Elect Director Peter E. Raskind	Mgmt	For	For	For
1j	Elect Director Eileen Serra	Mgmt	For	For	For
1k	Elect Director Mayo A. Shattuck, III	Mgmt	For	For	For
1l	Elect Director Craig Anthony Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

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: 1,755

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Terrence A. Duffy	Mgmt	For	For	For
1b	Elect Director Kathryn Benesh	Mgmt	For	For	For
1c	Elect Director Timothy S. Bitsberger	Mgmt	For	For	For
1d	Elect Director Charles P. Carey	Mgmt	For	For	For
1e	Elect Director Bryan T. Durkin	Mgmt	For	For	For
1f	Elect Director Harold Ford, Jr.	Mgmt	For	For	For
1g	Elect Director Martin J. Gepsman	Mgmt	For	For	For
1h	Elect Director Daniel G. Kaye	Mgmt	For	For	For
1i	Elect Director Phyllis M. Lockett	Mgmt	For	Against	Against
1j	Elect Director Deborah J. Lucas	Mgmt	For	For	For
1k	Elect Director Rahael Seifu	Mgmt	For	For	For
1l	Elect Director William R. Shepard	Mgmt	For	For	For
1m	Elect Director Howard J. Siegel	Mgmt	For	For	For
1n	Elect Director Dennis A. Suskind	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

CRH Plc

Meeting Date: 05/08/2025

Record Date: 03/12/2025

Primary Security ID: G25508105

Country: Ireland

Meeting Type: Annual

Ticker: CRH

Shares Voted: 3,325

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Re-elect Richie Boucher as Director	Mgmt	For	For	For
1b	Re-elect Caroline Dowling as Director	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Re-elect Richard Fearon as Director	Mgmt	For	For	For
1d	Re-elect Johan Karlstrom as Director	Mgmt	For	For	For
1e	Re-elect Shaun Kelly as Director	Mgmt	For	For	For
1f	Re-elect Badar Khan as Director	Mgmt	For	For	For
1g	Re-elect Lamar McKay as Director	Mgmt	For	For	For
1h	Re-elect Jim Mintern as Director	Mgmt	For	For	For
1i	Re-elect Gillian L. Platt as Director	Mgmt	For	For	For
1j	Re-elect Mary K. Rhinehart as Director	Mgmt	For	For	For
1k	Re-elect Siobhan Talbot as Director	Mgmt	For	For	For
1l	Re-elect Christina Verchere as Director	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5a	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
5b	Authorize Board to Fix Remuneration of Auditors	Mgmt	For	For	For
6	Authorize Issue of Equity	Mgmt	For	For	For
7	Authorize Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
8	Authorize Share Repurchase Program	Mgmt	For	For	For
9	Authorize Reissuance of Treasury Shares	Mgmt	For	For	For
10	Require Advance Notice for Shareholder Proposals/Nominations	Mgmt	For	For	For
11a	Adopt Plurality Voting in Contested Director Elections	Mgmt	For	For	For
11b	Amend Articles of Association to Allow the Board to Determine the Number of Directors and Provide for Holdover Directors	Mgmt	For	For	For
12	Amend Articles of Association	Mgmt	For	For	For

DexCom, Inc.

Meeting Date: 05/08/2025

Record Date: 03/13/2025

Primary Security ID: 252131107

Country: USA

Meeting Type: Annual

Ticker: DXCM

Shares Voted: 1,891

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kevin R. Sayer	Mgmt	For	For	For
1.2	Elect Director Steven R. Altman	Mgmt	For	For	For
1.3	Elect Director Nicholas Augustinos	Mgmt	For	For	For
1.4	Elect Director Richard A. Collins	Mgmt	For	For	For
1.5	Elect Director Karen Dahut *Withdrawn Resolution*	Mgmt			
1.6	Elect Director Rimma Driscoll	Mgmt	For	For	For
1.7	Elect Director Mark G. Foletta	Mgmt	For	For	For
1.8	Elect Director Renee Gala	Mgmt	For	For	For
1.9	Elect Director Bridgette P. Heller	Mgmt	For	For	For
1.10	Elect Director Kyle Malady	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

DTE Energy Company

Meeting Date: 05/08/2025

Record Date: 03/11/2025

Primary Security ID: 233331107

Country: USA

Meeting Type: Annual

Ticker: DTE

Shares Voted: 980

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nicholas K. Akins	Mgmt	For	For	For
1.2	Elect Director David A. Brandon	Mgmt	For	For	For
1.3	Elect Director Deborah L. Byers	Mgmt	For	For	For
1.4	Elect Director Charles G. McClure, Jr.	Mgmt	For	For	For



DTE Energy Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Gail J. McGovern	Mgmt	For	For	For
1.6	Elect Director Mark A. Murray	Mgmt	For	For	For
1.7	Elect Director Gerardo Norcia	Mgmt	For	For	For
1.8	Elect Director Cassandra Santos	Mgmt	For	For	For
1.9	Elect Director Robert C. Skaggs, Jr.	Mgmt	For	For	For
1.10	Elect Director David A. Thomas	Mgmt	For	For	For
1.11	Elect Director Gary H. Torgow	Mgmt	For	For	For
1.12	Elect Director Valerie M. Williams	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Right to Call Special Meeting	SH	Against	Against	Against

Ecolab Inc.

Meeting Date: 05/08/2025

Record Date: 03/11/2025

Primary Security ID: 278865100

Country: USA

Meeting Type: Annual

Ticker: ECL

Shares Voted: 1,220

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Judson B. Althoff	Mgmt	For	For	For
1b	Elect Director Shari L. Ballard	Mgmt	For	For	For
1c	Elect Director Christophe Beck	Mgmt	For	For	For
1d	Elect Director Michel D. Doukeris	Mgmt	For	For	For
1e	Elect Director Eric M. Green	Mgmt	For	For	For
1f	Elect Director Marion K. Gross	Mgmt	For	For	For
1g	Elect Director Michael Larson	Mgmt	For	For	For
1h	Elect Director David W. MacLennan	Mgmt	For	For	For
1i	Elect Director Tracy B. McKibben	Mgmt	For	For	For
1j	Elect Director Lionel L. Nowell, III	Mgmt	For	For	For

Ecolab Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Victoria J. Reich	Mgmt	For	For	For
1l	Elect Director Suzanne M. Vautrinot	Mgmt	For	For	For
1m	Elect Director John J. Zillmer	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For

Edwards Lifesciences Corporation

Meeting Date: 05/08/2025	Country: USA	Ticker: EW
Record Date: 03/11/2025	Meeting Type: Annual	
Primary Security ID: 28176E108		

Shares Voted: 2,885

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Leslie C. Davis	Mgmt	For	For	For
1.2	Elect Director David T. Feinberg	Mgmt	For	For	For
1.3	Elect Director Kieran T. Gallahue	Mgmt	For	For	For
1.4	Elect Director Leslie S. Heisz	Mgmt	For	For	For
1.5	Elect Director Paul A. LaViolette	Mgmt	For	For	For
1.6	Elect Director Steven R. Loranger	Mgmt	For	For	For
1.7	Elect Director Ramona Sequeira	Mgmt	For	For	For
1.8	Elect Director Nicholas J. Valeriani	Mgmt	For	For	For
1.9	Elect Director Bernard J. Zovighian	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Amend Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For

Equifax Inc.

Meeting Date: 05/08/2025

Record Date: 03/07/2025

Primary Security ID: 294429105

Country: USA

Meeting Type: Annual

Ticker: EFX

Shares Voted: 594

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark W. Begor	Mgmt	For	For	For
1b	Elect Director Mark L. Feidler	Mgmt	For	For	For
1c	Elect Director Karen L. Fichuk	Mgmt	For	For	For
1d	Elect Director G. Thomas Hough	Mgmt	For	For	For
1e	Elect Director Barbara A. Larson	Mgmt	For	For	For
1f	Elect Director Robert D. Marcus	Mgmt	For	For	For
1g	Elect Director Scott A. McGregor	Mgmt	For	For	For
1h	Elect Director John A. McKinley	Mgmt	For	For	For
1i	Elect Director Melissa D. Smith	Mgmt	For	For	For
1j	Elect Director Audrey Boone Tillman	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For

Ford Motor Company

Meeting Date: 05/08/2025

Record Date: 03/12/2025

Primary Security ID: 345370860

Country: USA

Meeting Type: Annual

Ticker: F

Shares Voted: 18,790

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kimberly A. Casiano	Mgmt	For	For	For
1b	Elect Director Adriana Cisneros	Mgmt	For	For	For
1c	Elect Director Alexandra Ford English	Mgmt	For	For	For
1d	Elect Director James D. Farley, Jr.	Mgmt	For	For	For

## Ford Motor Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Henry Ford, III	Mgmt	For	For	For
1f	Elect Director William Clay Ford, Jr.	Mgmt	For	Against	Against
1g	Elect Director William W. Helman, IV	Mgmt	For	For	For
1h	Elect Director Jon M. Huntsman, Jr.	Mgmt	For	For	For
1i	Elect Director William E. Kennard	Mgmt	For	Against	Against
1j	Elect Director John C. May	Mgmt	For	For	For
1k	Elect Director Beth E. Mooney	Mgmt	For	For	For
1l	Elect Director Lynn Vojvodich Radakovich	Mgmt	For	For	For
1m	Elect Director John L. Thornton	Mgmt	For	For	For
1n	Elect Director John B. Veihmeyer	Mgmt	For	For	For
1o	Elect Director John S. Weinberg	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Tax Benefits Preservation Plan	Mgmt	For	For	For
5	Report on Efforts to Reduce GHG Emissions in Alignment with Net Zero Goals	SH	Against	Against	Against
6	Disclose Research on DEI Strategy - Withdrawn Proposal	SH			

## IDEX Corporation

Meeting Date: 05/08/2025

Country: USA

Ticker: IEX

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 45167R104

Shares Voted: 375					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eric D. Ashleman	Mgmt	For	For	For
1b	Elect Director Stephanie J. Disher	Mgmt	For	For	For
1c	Elect Director Matthijs Glastra	Mgmt	For	For	For

IDEX Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Company's Hiring Practices with Respect to Formerly Incarcerated People	SH	Against	Against	Against

Norfolk Southern Corporation

Meeting Date: 05/08/2025	Country: USA	Ticker: NSC
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 655844108		

Shares Voted: 1,076

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard H. Anderson	Mgmt	For	For	For
1b	Elect Director William Clyburn, Jr.	Mgmt	For	For	For
1c	Elect Director Philip S. Davidson	Mgmt	For	For	For
1d	Elect Director Francesca A. DeBiase	Mgmt	For	For	For
1e	Elect Director Marcela E. Donadio	Mgmt	For	For	For
1f	Elect Director Sameh Fahmy	Mgmt	For	For	For
1g	Elect Director Mark R. George	Mgmt	For	For	For
1h	Elect Director Mary Kathryn "Heidi" Heitkamp	Mgmt	For	For	For
1i	Elect Director John C. Huffard, Jr.	Mgmt	For	For	For
1j	Elect Director Christopher T. Jones	Mgmt	For	For	For
1k	Elect Director Gilbert H. Lamphere	Mgmt	For	For	For
1l	Elect Director Claude Mongeau	Mgmt	For	For	For
1m	Elect Director Lori J. Ryerkerk	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Nucor Corporation

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 670346105

Country: USA

Meeting Type: Annual

Ticker: NUE

Shares Voted: 1,143

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Norma B. Clayton	Mgmt	For	For	For
1.2	Elect Director Patrick J. Dempsey	Mgmt	For	For	For
1.3	Elect Director Nicholas C. Gangestad	Mgmt	For	For	For
1.4	Elect Director Christopher J. Kearney	Mgmt	For	For	For
1.5	Elect Director Laurette T. Koellner	Mgmt	For	For	For
1.6	Elect Director Michael W. Lamach	Mgmt	For	For	For
1.7	Elect Director Leon J. Topalian	Mgmt	For	For	For
1.8	Elect Director Nadjia Y. West	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For

Prologis, Inc.

Meeting Date: 05/08/2025

Record Date: 03/12/2025

Primary Security ID: 74340W103

Country: USA

Meeting Type: Annual

Ticker: PLD

Shares Voted: 4,540

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Hamid R. Moghadam	Mgmt	For	For	For
1b	Elect Director Cristina G. Bitá	Mgmt	For	For	For
1c	Elect Director James B. Connor	Mgmt	For	For	For
1d	Elect Director George L. Fotiades	Mgmt	For	For	For
1e	Elect Director Lydia H. Kennard	Mgmt	For	For	For
1f	Elect Director Daniel S. Letter	Mgmt	For	For	For

Prologis, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Irving F. Lyons, III	Mgmt	For	For	For
1h	Elect Director Guy A. Metcalfe	Mgmt	For	For	For
1i	Elect Director Avid Modjtabai	Mgmt	For	For	For
1j	Elect Director David P. O'Connor	Mgmt	For	For	For
1k	Elect Director Olivier Piani	Mgmt	For	For	For
1l	Elect Director Sarah A. Slusser	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Stryker Corporation

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 863667101

Country: USA

Meeting Type: Annual

Ticker: SYK

Shares Voted: 1,548

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mary K. Brainerd	Mgmt	For	For	For
1b	Elect Director Giovanni Caforio	Mgmt	For	For	For
1c	Elect Director Kevin A. Lobo	Mgmt	For	For	For
1d	Elect Director Emmanuel P. Maceda	Mgmt	For	For	For
1e	Elect Director Sherilyn S. McCoy	Mgmt	For	For	For
1f	Elect Director Rachel M. Ruggeri	Mgmt	For	For	For
1g	Elect Director Andrew K. Silvernail	Mgmt	For	For	For
1h	Elect Director Lisa M. Skeete Tatum	Mgmt	For	For	For
1i	Elect Director Ronda E. Stryker	Mgmt	For	For	For
1j	Elect Director Rajeev Suri	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For

Stryker Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Amend Restricted Stock Plan	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
6	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
7	Report on Political Contributions and Expenditures	SH	Against	Against	Against

T. Rowe Price Group, Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: TROW
Record Date: 03/03/2025	Meeting Type: Annual	
Primary Security ID: 74144T108		

Shares Voted: 132

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Glenn R. August	Mgmt	For	For	For
1b	Elect Director Mark S. Bartlett	Mgmt	For	For	For
1c	Elect Director William P. Donnelly	Mgmt	For	For	For
1d	Elect Director Dina Dublon	Mgmt	For	For	For
1e	Elect Director Robert F. MacLellan	Mgmt	For	For	For
1f	Elect Director Eileen P. Rominger	Mgmt	For	For	For
1g	Elect Director Robert W. Sharps	Mgmt	For	For	For
1h	Elect Director Cynthia F. Smith	Mgmt	For	For	For
1i	Elect Director Robert J. Stevens	Mgmt	For	For	For
1j	Elect Director Sandra S. Wijnberg	Mgmt	For	For	For
1k	Elect Director Alan D. Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For



# The Kraft Heinz Company

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 500754106

Country: USA

Meeting Type: Annual

Ticker: KHC

Shares Voted: 3,739

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carlos Abrams-Rivera	Mgmt	For	For	For
1b	Elect Director Humberto P. Alfonso	Mgmt	For	For	For
1c	Elect Director John T. Cahill	Mgmt	For	For	For
1d	Elect Director Lori Dickerson Fouche	Mgmt	For	For	For
1e	Elect Director Diane Gherson	Mgmt	For	For	For
1f	Elect Director Timothy Kenesey	Mgmt	For	For	For
1g	Elect Director Alicia Knapp	Mgmt	For	For	For
1h	Elect Director Elio Leoni Sceti	Mgmt	For	For	For
1i	Elect Director James Park	Mgmt	For	For	For
1j	Elect Director Miguel Patricio	Mgmt	For	For	For
1k	Elect Director John C. Pope	Mgmt	For	For	For
1l	Elect Director Debby Soo	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on Recyclability Claims	SH	Against	Against	Against
5	Report on Plastic Packaging	SH	Against	Against	Against
6	Require Independent Board Chair	SH	Against	For	For

# Union Pacific Corporation

Meeting Date: 05/08/2025

Record Date: 03/14/2025

Primary Security ID: 907818108

Country: USA

Meeting Type: Annual

Ticker: UNP

Shares Voted: 2,978

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David B. Dillon	Mgmt	For	For	For
1b	Elect Director Sheri H. Edison	Mgmt	For	For	For

Union Pacific Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Teresa M. Finley	Mgmt	For	For	For
1d	Elect Director Deborah C. Hopkins	Mgmt	For	For	For
1e	Elect Director Jane H. Lute	Mgmt	For	For	For
1f	Elect Director Michael R. McCarthy	Mgmt	For	For	For
1g	Elect Director Doyle R. Simons	Mgmt	For	For	For
1h	Elect Director John K. Tien, Jr.	Mgmt	For	For	For
1i	Elect Director V. James Vena	Mgmt	For	For	For
1j	Elect Director John P. Wiehoff	Mgmt	For	For	For
1k	Elect Director Christopher J. Williams	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against

United Parcel Service, Inc.

Meeting Date: 05/08/2025

Country: USA

Ticker: UPS

Record Date: 03/10/2025

Meeting Type: Annual

Primary Security ID: 911312106

Shares Voted: 3,558

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney Adkins	Mgmt	For	For	For
1b	Elect Director Eva Boratto	Mgmt	For	For	For
1c	Elect Director Kevin Clark	Mgmt	For	For	For
1d	Elect Director Wayne Hewett	Mgmt	For	For	For
1e	Elect Director Angela Hwang	Mgmt	For	For	For
1f	Elect Director Kate Johnson	Mgmt	For	Against	Against
1g	Elect Director William Johnson	Mgmt	For	Against	Against
1h	Elect Director Franck Moison	Mgmt	For	Against	Against
1i	Elect Director Christiana Smith Shi	Mgmt	For	For	For
1j	Elect Director Russell Stokes	Mgmt	For	Against	Against
1k	Elect Director Carol B. Tome	Mgmt	For	For	For

United Parcel Service, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Kevin M. Warsh	Mgmt	For	Against	Against
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
5	Report on Risks Arising from Voluntary Carbon-Reduction Commitments	SH	Against	Against	Against

United Rentals, Inc.

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 911363109

Country: USA

Meeting Type: Annual

Ticker: URI

Shares Voted: 312					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Julie M. Heuer Brandt	Mgmt	For	For	For
1b	Elect Director Marc A. Bruno	Mgmt	For	For	For
1c	Elect Director Larry D. De Shon	Mgmt	For	For	For
1d	Elect Director Matthew J. Flannery	Mgmt	For	For	For
1e	Elect Director Kim Harris Jones	Mgmt	For	For	For
1f	Elect Director Terri L. Kelly	Mgmt	For	For	For
1g	Elect Director Michael J. Kneeland	Mgmt	For	For	For
1h	Elect Director Francisco J. Lopez-Balboa	Mgmt	For	For	For
1i	Elect Director Gracia C. Martore	Mgmt	For	For	For
1j	Elect Director Shiv Singh	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Against	Against	Against

# WEC Energy Group, Inc.

Meeting Date: 05/08/2025

Record Date: 03/07/2025

Primary Security ID: 92939U106

Country: USA

Meeting Type: Annual

Ticker: WEC

Shares Voted: 1,536

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Warner L. Baxter	Mgmt	For	For	For
1.2	Elect Director Ave M. Bie	Mgmt	For	For	For
1.3	Elect Director Danny L. Cunningham	Mgmt	For	For	For
1.4	Elect Director William M. Farrow, III	Mgmt	For	For	For
1.5	Elect Director Cristina A. Garcia-Thomas	Mgmt	For	For	For
1.6	Elect Director Maria C. Green	Mgmt	For	For	For
1.7	Elect Director Gale E. Klappa	Mgmt	For	For	For
1.8	Elect Director Thomas K. Lane	Mgmt	For	For	For
1.9	Elect Director John D. Lange	Mgmt	For	For	For
1.10	Elect Director Scott J. Lauber	Mgmt	For	For	For
1.11	Elect Director Ulice Payne, Jr.	Mgmt	For	For	For
1.12	Elect Director Mary Ellen Stanek	Mgmt	For	For	For
1.13	Elect Director Glen E. Tellock	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement to Amend Articles of Incorporation	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement to Amend Bylaws	Mgmt	For	For	For
6	Adopt Simple Majority Vote	SH	Against	For	For

# Zebra Technologies Corporation

Meeting Date: 05/08/2025

Record Date: 03/14/2025

Primary Security ID: 989207105

Country: USA

Meeting Type: Annual

Ticker: ZBRA

## Zebra Technologies Corporation

Shares Voted: 245

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nelda J. Connors	Mgmt	For	For	For
1b	Elect Director Frank B. Modruson	Mgmt	For	For	For
1c	Elect Director Michael A. Smith	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## AbbVie Inc.

Meeting Date: 05/09/2025Country: USATicker: ABBV  
Record Date: 03/10/2025Meeting Type: Annual  
Primary Security ID: 00287Y109

Shares Voted: 8,631

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

## Colgate-Palmolive Company

Meeting Date: 05/09/2025Country: USATicker: CL  
Record Date: 03/10/2025Meeting Type: Annual  
Primary Security ID: 194162103

Colgate-Palmolive Company

Shares Voted: 3,970

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John P. Bilbrey	Mgmt	For	For	For
1b	Elect Director John T. Cahill	Mgmt	For	For	For
1c	Elect Director Steven A. Cahillane	Mgmt	For	For	For
1d	Elect Director Lisa M. Edwards	Mgmt	For	For	For
1e	Elect Director C. Martin Harris	Mgmt	For	For	For
1f	Elect Director Martina Hund-Mejean	Mgmt	For	For	For
1g	Elect Director Kimberly A. Nelson	Mgmt	For	For	For
1h	Elect Director Brian O. Newman	Mgmt	For	For	For
1i	Elect Director Lorrie M. Norrington	Mgmt	For	For	For
1j	Elect Director Noel Wallace	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against
5	Revisit Plastic Packaging Policies	SH	Against	Against	Against

Lockheed Martin Corporation

Meeting Date: 05/09/2025Country: USATicker: LMT

Record Date: 02/28/2025Meeting Type: Annual

Primary Security ID: 539830109

Shares Voted: 1,134

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John C. Aquilino	Mgmt	For	For	For
1.2	Elect Director David B. Burritt	Mgmt	For	For	For
1.3	Elect Director John M. Donovan	Mgmt	For	For	For
1.4	Elect Director Joseph F. Dunford, Jr.	Mgmt	For	For	For
1.5	Elect Director Thomas J. Falk	Mgmt	For	For	For
1.6	Elect Director Vicki A. Hollub	Mgmt	For	For	For

## Lockheed Martin Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Debra L. Reed-Klages	Mgmt	For	For	For
1.8	Elect Director James D. Taiclet	Mgmt	For	For	For
1.9	Elect Director Heather A. Wilson	Mgmt	For	For	For
1.10	Elect Director Patricia E. Yarrington	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For
5	Report on Alignment of Political Activities with Company's Human Rights Policy	SH	Against	Against	Against
6	Report on Risks of DEI Requirements in Hiring and Recruitment *Withdrawn Resolution*	SH			

## Marriott International, Inc.

Meeting Date: 05/09/2025	Country: USA	Ticker: MAR
Record Date: 03/12/2025	Meeting Type: Annual	
Primary Security ID: 571903202		

Shares Voted: 1,155

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony G. Capuano	Mgmt	For	For	For
1b	Elect Director Isabella D. Goren	Mgmt	For	For	For
1c	Elect Director Deborah Marriott Harrison	Mgmt	For	For	For
1d	Elect Director Frederick A. Henderson	Mgmt	For	For	For
1e	Elect Director Lauren R. Hobart	Mgmt	For	For	For
1f	Elect Director Debra L. Lee	Mgmt	For	For	For
1g	Elect Director Aylwin B. Lewis	Mgmt	For	For	For
1h	Elect Director David S. Marriott	Mgmt	For	For	For
1i	Elect Director Margaret M. McCarthy	Mgmt	For	For	For
1j	Elect Director Grant F. Reid	Mgmt	For	For	For

Marriott International, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Horacio D. Rozanski	Mgmt	For	For	For
1l	Elect Director Susan C. Schwab	Mgmt	For	For	For
1m	Elect Director Sean C. Tresvant	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Masco Corporation

Meeting Date: 05/09/2025Country: USATicker: MAS

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 574599106

Shares Voted: 1,054

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jonathon J. Nudi	Mgmt	For	For	For
1b	Elect Director Lisa A. Payne	Mgmt	For	For	For
1c	Elect Director Sandeep Reddy	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Amend the Business Combination Provisions	Mgmt	For	For	For
6	Declassify the Board of Directors	Mgmt	For	For	For

Teradyne, Inc.

Meeting Date: 05/09/2025Country: USATicker: TER

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 880770102



Shares Voted: 775

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter Herweck	Mgmt	For	For	For
1b	Elect Director Mercedes Johnson	Mgmt	For	For	For
1c	Elect Director Ernest E. Maddock	Mgmt	For	For	For
1d	Elect Director Marilyn Matz	Mgmt	For	For	For
1e	Elect Director Gregory S. Smith	Mgmt	For	For	For
1f	Elect Director Paul J. Tufano	Mgmt	For	For	For
1g	Elect Director Bridget van Kralingen	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Political Contributions and Expenditures	SH	Against	For	For

The Progressive Corporation

Meeting Date: 05/09/2025Country: USATicker: PGR

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 743315103

Shares Voted: 2,885

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Philip Bleser	Mgmt	For	For	For
1b	Elect Director Stuart B. Burgdoerfer	Mgmt	For	For	For
1c	Elect Director Pamela J. Craig	Mgmt	For	For	For
1d	Elect Director Charles A. Davis	Mgmt	For	For	For
1e	Elect Director Roger N. Farah	Mgmt	For	For	For
1f	Elect Director Lawton W. Fitt	Mgmt	For	For	For
1g	Elect Director Susan Patricia Griffith	Mgmt	For	For	For
1h	Elect Director Devin C. Johnson	Mgmt	For	For	For
1i	Elect Director Jeffrey D. Kelly	Mgmt	For	For	For

## The Progressive Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Barbara R. Snyder	Mgmt	For	For	For
1k	Elect Director Kahina Van Dyke	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Vulcan Materials Company

Meeting Date: 05/09/2025	Country: USA	Ticker: VMC
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 929160109		

Shares Voted: 640

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lydia H. Kennard	Mgmt	For	For	For
1b	Elect Director Kathleen L. Quirk	Mgmt	For	For	For
1c	Elect Director David P. Steiner	Mgmt	For	For	For
1d	Elect Director Lee J. Styslinger, III	Mgmt	For	For	For
2	Approve Omnibus Stock Plan	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

## Weyerhaeuser Company

Meeting Date: 05/09/2025	Country: USA	Ticker: WY
Record Date: 03/11/2025	Meeting Type: Annual	
Primary Security ID: 962166104		

Shares Voted: 3,521

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Emmert	Mgmt	For	For	For
1b	Elect Director Rick R. Holley	Mgmt	For	For	For
1c	Elect Director Sara Grootwassink Lewis	Mgmt	For	For	For

## Weyerhaeuser Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Deidra C. Merriwether	Mgmt	For	For	For
1e	Elect Director Al Monaco	Mgmt	For	For	For
1f	Elect Director James C. O'Rourke	Mgmt	For	For	For
1g	Elect Director Nicole W. Piasecki	Mgmt	For	For	For
1h	Elect Director Lawrence A. Selzer	Mgmt	For	For	For
1i	Elect Director Devin W. Stockfish	Mgmt	For	For	For
1j	Elect Director Kim Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

## International Paper Company

Meeting Date: 05/12/2025

Country: USA

Ticker: IP

Record Date: 03/14/2025

Meeting Type: Annual

Primary Security ID: 460146103

Shares Voted: 1,749

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jamie A. Beggs	Mgmt	For	For	For
1b	Elect Director Christopher M. Connor	Mgmt	For	For	For
1c	Elect Director Ahmet C. Dorduncu	Mgmt	For	For	For
1d	Elect Director Anders Gustafsson	Mgmt	For	For	For
1e	Elect Director Jacqueline C. Hinman	Mgmt	For	For	For
1f	Elect Director Clinton A. Lewis, Jr.	Mgmt	For	For	For
1g	Elect Director David A. Robbie	Mgmt	For	For	For
1h	Elect Director Andrew K. Silvernail	Mgmt	For	For	For
1i	Elect Director Kathryn D. Sullivan	Mgmt	For	For	For
1j	Elect Director Scott A. Tozier	Mgmt	For	For	For
1k	Elect Director Anton V. Vincent	Mgmt	For	For	For

International Paper Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on the Company's LGBTQ+ Equity and Inclusion Efforts	SH	Against	Against	Against

NiSource Inc.

Meeting Date: 05/12/2025	Country: USA	Ticker: NI
Record Date: 03/17/2025	Meeting Type: Annual	
Primary Security ID: 65473P105		

Shares Voted: 2,286

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter A. Altabef	Mgmt	For	For	For
1b	Elect Director Sondra L. Barbour	Mgmt	For	For	For
1c	Elect Director Theodore H. Bunting, Jr.	Mgmt	For	For	For
1d	Elect Director Eric L. Butler	Mgmt	For	For	For
1e	Elect Director Deborah A. Henretta	Mgmt	For	For	For
1f	Elect Director Deborah A. P. Hersman	Mgmt	For	For	For
1g	Elect Director Michael E. Jesanis	Mgmt	For	For	For
1h	Elect Director William D. Johnson	Mgmt	For	For	For
1i	Elect Director Kevin T. Kabat	Mgmt	For	For	For
1j	Elect Director Cassandra S. Lee	Mgmt	For	For	For
1k	Elect Director John McAvoy	Mgmt	For	For	For
1l	Elect Director Lloyd M. Yates	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

3M Company

Meeting Date: 05/13/2025

Record Date: 03/18/2025

Primary Security ID: 88579Y101

Country: USA

Meeting Type: Annual

Ticker: MMM

Shares Voted: 2,654

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David P. Bozeman	Mgmt	For	For	For
1b	Elect Director Thomas (Tony) K. Brown	Mgmt	For	For	For
1c	Elect Director William M. Brown	Mgmt	For	For	For
1d	Elect Director Audrey Choi	Mgmt	For	For	For
1e	Elect Director Anne H. Chow	Mgmt	For	For	For
1f	Elect Director David B. Dillon	Mgmt	For	For	For
1g	Elect Director James R. Fitterling	Mgmt	For	For	For
1h	Elect Director Suzan Kereere	Mgmt	For	For	For
1i	Elect Director Gregory R. Page	Mgmt	For	For	For
1j	Elect Director Pedro J. Pizarro	Mgmt	For	For	For
1k	Elect Director Thomas W. Sweet	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Alexandria Real Estate Equities, Inc.

Meeting Date: 05/13/2025

Record Date: 03/31/2025

Primary Security ID: 015271109

Country: USA

Meeting Type: Annual

Ticker: ARE

Shares Voted: 774

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Joel S. Marcus	Mgmt	For	For	For
1b	Elect Director Steven R. Hash	Mgmt	For	For	For
1c	Elect Director Claire Aldridge	Mgmt	For	For	For
1d	Elect Director James P. Cain	Mgmt	For	For	For
1e	Elect Director Maria C. Freire	Mgmt	For	For	For
1f	Elect Director Richard H. Klein	Mgmt	For	For	For

Alexandria Real Estate Equities, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Sheila K. McGrath	Mgmt	For	For	For
1h	Elect Director Michael A. Woronoff	Mgmt	For	For	For
2	Amend Restricted Stock Plan	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Adopt Simple Majority Vote	SH	Against	For	For

Arthur J. Gallagher & Co.

Meeting Date: 05/13/2025Country: USATicker: AJG

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: 363576109

Shares Voted: 1,209

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

Centene Corporation

Meeting Date: 05/13/2025Country: USATicker: CNC

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 15135B101

Centene Corporation

Shares Voted: 2,468

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jessica L. Blume	Mgmt	For	For	For
1b	Elect Director Kenneth A. Burdick	Mgmt	For	For	For
1c	Elect Director Christopher J. Coughlin	Mgmt	For	For	For
1d	Elect Director H. James Dallas	Mgmt	For	For	For
1e	Elect Director Wayne S. DeVeydt	Mgmt	For	For	For
1f	Elect Director Frederick H. Eppinger	Mgmt	For	For	For
1g	Elect Director Monte E. Ford	Mgmt	For	For	For
1h	Elect Director Thomas R. Greco	Mgmt	For	For	For
1i	Elect Director Sarah M. London	Mgmt	For	For	For
1j	Elect Director Theodore R. Samuels	Mgmt	For	For	For
1k	Elect Director Kenneth Y. Tanji	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Efforts to Reduce GHG Emissions in Alignment with Paris Agreement Goal	SH	Against	Against	Against
6	Report on Climate Risk in Retirement Plan Options	SH	Against	Against	Against

ConocoPhillips

Meeting Date: 05/13/2025Country: USATicker: COP

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

Primary Security ID: 20825C104

Shares Voted: 6,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Dennis V. Arriola	Mgmt	For	For	For
1b	Elect Director Nelda J. Connors	Mgmt	For	For	For
1c	Elect Director Gay Huey Evans	Mgmt	For	For	For
1d	Elect Director Jeffrey A. Joerres	Mgmt	For	For	For

ConocoPhillips

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Ryan M. Lance	Mgmt	For	For	For
1f	Elect Director Timothy A. Leach	Mgmt	For	For	For
1g	Elect Director William H. McRaven	Mgmt	For	For	For
1h	Elect Director Sharmila Mulligan	Mgmt	For	For	For
1i	Elect Director Arjun N. Murti	Mgmt	For	For	For
1j	Elect Director Robert A. Niblock	Mgmt	For	For	For
1k	Elect Director David T. Seaton	Mgmt	For	For	For
1l	Elect Director R.A. Walker	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Remove All GHG Emissions Reduction Targets	SH	Against	Against	Against

Cummins Inc.

Meeting Date: 05/13/2025

Record Date: 03/14/2025

Primary Security ID: 231021106

Country: USA

Meeting Type: Annual

Ticker: CMI

Shares Voted: 656

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Elect Director Jennifer W. Rumsey	Mgmt	For	For	For
2	Elect Director Gary L. Belske	Mgmt	For	For	For
3	Elect Director Robert J. Bernhard	Mgmt	For	For	For
4	Elect Director Bruno V. Di Leo Allen	Mgmt	For	For	For
5	Elect Director Daniel W. Fisher	Mgmt	For	For	For
6	Elect Director Carla A. Harris	Mgmt	For	For	For
7	Elect Director Thomas J. Lynch	Mgmt	For	For	For
8	Elect Director William I. Miller	Mgmt	For	For	For
9	Elect Director Kimberly A. Nelson	Mgmt	For	For	For
10	Elect Director Karen H. Quintos	Mgmt	For	For	For



Cummins Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
11	Elect Director John H. Stone	Mgmt	For	For	For
12	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
13	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
14	Require Independent Board Chair	SH	Against	For	For

Essex Property Trust, Inc.

Meeting Date: 05/13/2025	Country: USA	Ticker: ESS
Record Date: 02/28/2025	Meeting Type: Annual	
Primary Security ID: 297178105		

Shares Voted: 296

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John V. Arabia	Mgmt	For	For	For
1b	Elect Director Keith R. Guericke	Mgmt	For	Against	Against
1c	Elect Director Anne B. Gust	Mgmt	For	For	For
1d	Elect Director Maria R. Hawthorne	Mgmt	For	For	For
1e	Elect Director Amal M. Johnson	Mgmt	For	For	For
1f	Elect Director Mary Kasaris	Mgmt	For	For	For
1g	Elect Director Angela L. Kleiman	Mgmt	For	For	For
1h	Elect Director Irving F. Lyons, III	Mgmt	For	For	For
1i	Elect Director George M. Marcus	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Loews Corporation

Meeting Date: 05/13/2025	Country: USA	Ticker: L
Record Date: 03/18/2025	Meeting Type: Annual	
Primary Security ID: 540424108		

Loews Corporation

Shares Voted: 863

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Ann E. Berman	Mgmt	For	For	For
1B	Elect Director Charles D. Davidson	Mgmt	For	For	For
1C	Elect Director Charles M. Diker	Mgmt	For	For	For
1D	Elect Director Paul J. Fribourg	Mgmt	For	For	For
1E	Elect Director Walter L. Harris	Mgmt	For	For	For
1F	Elect Director Jonathan C. Locker	Mgmt	For	For	For
1G	Elect Director Susan P. Peters	Mgmt	For	For	For
1H	Elect Director Alexander H. Tisch	Mgmt	For	For	For
1I	Elect Director Benjamin J. Tisch	Mgmt	For	For	For
1J	Elect Director James S. Tisch	Mgmt	For	For	For
1K	Elect Director Anthony Walters	Mgmt	For	Against	Against
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	Against	Against

Manhattan Associates, Inc.

Meeting Date: 05/13/2025Country: USATicker: MANH

Record Date: 03/18/2025Meeting Type: Annual

Primary Security ID: 562750109

Shares Voted: 271

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas E. Noonan	Mgmt	For	For	For
1b	Elect Director Kimberly A. Kuryea	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Prudential Financial, Inc.

Meeting Date: 05/13/2025

Record Date: 03/14/2025

Primary Security ID: 744320102

Country: USA

Meeting Type: Annual

Ticker: PRU

Shares Voted: 1,754

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Gilbert F. Casellas	Mgmt	For	For	For
1.2	Elect Director Carmine Di Sibio	Mgmt	For	For	For
1.3	Elect Director Martina Hund-Mejean	Mgmt	For	For	For
1.4	Elect Director Wendy E. Jones	Mgmt	For	For	For
1.5	Elect Director Charles F. Lowrey	Mgmt	For	For	For
1.6	Elect Director Sandra Pianalto	Mgmt	For	For	For
1.7	Elect Director Christine A. Poon	Mgmt	For	For	For
1.8	Elect Director Andrew F. Sullivan	Mgmt	For	For	For
1.9	Elect Director Michael A. Todman	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For

Realty Income Corporation

Meeting Date: 05/13/2025

Record Date: 03/03/2025

Primary Security ID: 756109104

Country: USA

Meeting Type: Annual

Ticker: O

Shares Voted: 4,135

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Priscilla Almodovar	Mgmt	For	For	For
1b	Elect Director A. Larry Chapman	Mgmt	For	For	For
1c	Elect Director Reginald H. Gilyard	Mgmt	For	For	For
1d	Elect Director Mary Hogan Preusse	Mgmt	For	For	For

Realty Income Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Priya Cherian Huskins	Mgmt	For	For	For
1f	Elect Director Jeff A. Jacobson	Mgmt	For	For	For
1g	Elect Director Gerardo I. Lopez	Mgmt	For	For	For
1h	Elect Director Michael D. McKee	Mgmt	For	For	For
1i	Elect Director Gregory T. McLaughlin	Mgmt	For	For	For
1j	Elect Director Sumit Roy	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Sempra

Meeting Date: 05/13/2025

Record Date: 03/20/2025

Primary Security ID: 816851109

Country: USA

Meeting Type: Annual

Ticker: SRE

Shares Voted: 3,161

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Andrés Conesa	Mgmt	For	For	For
1b	Elect Director Pablo A. Ferrero	Mgmt	For	For	For
1c	Elect Director Jennifer M. Kirk	Mgmt	For	For	For
1d	Elect Director Richard J. Mark	Mgmt	For	For	For
1e	Elect Director Jeffrey W. Martin	Mgmt	For	For	For
1f	Elect Director Michael N. Mears	Mgmt	For	For	For
1g	Elect Director Kevin C. Sagara	Mgmt	For	For	For
1h	Elect Director Jack T. Taylor	Mgmt	For	For	For
1i	Elect Director Cynthia J. (CJ) Warner	Mgmt	For	For	For
1j	Elect Director Anya Weaving	Mgmt	For	For	For
1k	Elect Director James C. Yardley	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Sun Communities, Inc.

Meeting Date: 05/13/2025Country: USATicker: SUI

Record Date: 03/18/2025Meeting Type: Annual

Primary Security ID: 866674104

Shares Voted: 614

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gary A. Shiffman	Mgmt	For	For	For
1b	Elect Director Tonya Allen	Mgmt	For	For	For
1c	Elect Director Meghan G. Baivier	Mgmt	For	For	For
1d	Elect Director Jeff T. Blau	Mgmt	For	For	For
1e	Elect Director Mark A. Denien	Mgmt	For	For	For
1f	Elect Director Jerome W. Ehlinger	Mgmt	For	For	For
1g	Elect Director Brian M. Hermelin	Mgmt	For	For	For
1h	Elect Director Craig A. Leupold	Mgmt	For	For	For
1i	Elect Director Clunet R. Lewis	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Ventas, Inc.

Meeting Date: 05/13/2025Country: USATicker: VTR

Record Date: 03/19/2025Meeting Type: Annual

Primary Security ID: 92276F100

Shares Voted: 2,064

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Melody C. Barnes	Mgmt	For	For	For
1b	Elect Director Theodore R. Bigman	Mgmt	For	For	For
1c	Elect Director Debra A. Cafaro	Mgmt	For	For	For
1d	Elect Director Michael J. Embler	Mgmt	For	For	For
1e	Elect Director Matthew J. Lustig	Mgmt	For	For	For
1f	Elect Director Roxanne M. Martino	Mgmt	For	For	For

Ventas, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Marguerite M. Nader	Mgmt	For	For	For
1h	Elect Director Sean P. Nolan	Mgmt	For	For	For
1i	Elect Director Walter C. Rakowich	Mgmt	For	For	For
1j	Elect Director Joe V. Rodriguez, Jr.	Mgmt	For	For	For
1k	Elect Director Sumit Roy	Mgmt	For	For	For
1l	Elect Director Maurice S. Smith	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Increase Authorized Common Stock	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For

Waste Management, Inc.

Meeting Date: 05/13/2025

Record Date: 03/18/2025

Primary Security ID: 94106L109

Country: USA

Meeting Type: Annual

Ticker: WM

Shares Voted: 1,962

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas L. Bene	Mgmt	For	For	For
1b	Elect Director Bruce E. Chinn	Mgmt	For	For	For
1c	Elect Director James C. Fish, Jr.	Mgmt	For	For	For
1d	Elect Director Andres R. Gluski	Mgmt	For	For	For
1e	Elect Director Victoria M. Holt	Mgmt	For	For	For
1f	Elect Director Kathleen M. Mazzearella	Mgmt	For	For	For
1g	Elect Director Sean E. Menke	Mgmt	For	For	For
1h	Elect Director William B. Plummer	Mgmt	For	For	For
1i	Elect Director Maryrose T. Sylvester	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Waste Management, Inc.

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

Xylem Inc.

Meeting Date: 05/13/2025

Country: USA

Ticker: XYL

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 98419M100

Shares Voted: 1,188

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Earl R. Ellis	Mgmt	For	For	For
1b	Elect Director Robert F. Friel	Mgmt	For	For	For
1c	Elect Director Lisa Glatch	Mgmt	For	For	For
1d	Elect Director Victoria D. Harker	Mgmt	For	For	For
1e	Elect Director Mark D. Morelli	Mgmt	For	For	For
1f	Elect Director Jerome A. Peribere	Mgmt	For	For	For
1g	Elect Director Matthew F. Pine	Mgmt	For	For	For
1h	Elect Director Lila Tretikov	Mgmt	For	For	For
1i	Elect Director Uday Yadav	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Advanced Micro Devices, Inc.

Meeting Date: 05/14/2025

Country: USA

Ticker: AMD

Record Date: 03/19/2025

Meeting Type: Annual

Primary Security ID: 007903107

Shares Voted: 7,991

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nora M. Denzel	Mgmt	For	For	For

Advanced Micro Devices, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Michael P. Gregoire	Mgmt	For	For	For
1c	Elect Director Joseph A. Householder	Mgmt	For	For	For
1d	Elect Director John W. Marren	Mgmt	For	For	For
1e	Elect Director Jon A. Olson	Mgmt	For	For	For
1f	Elect Director Lisa T. Su	Mgmt	For	For	For
1g	Elect Director Abhi Y. Talwalkar	Mgmt	For	For	For
1h	Elect Director Elizabeth W. Vanderslice	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Increase Authorized Common Stock	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
6	Amend Right to Call Special Meeting	SH	Against	Against	Against

Akamai Technologies, Inc.

Meeting Date: 05/14/2025Country: USATicker: AKAM

Record Date: 03/19/2025Meeting Type: Annual

Primary Security ID: 00971T101

Shares Voted: 730

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Sharon Bowen	Mgmt	For	For	For
1.2	Elect Director Marianne Brown	Mgmt	For	For	For
1.3	Elect Director Monte Ford	Mgmt	For	For	For
1.4	Elect Director Dan Hesse	Mgmt	For	For	For
1.5	Elect Director Tom Killalea	Mgmt	For	For	For
1.6	Elect Director Tom Leighton	Mgmt	For	For	For
1.7	Elect Director Jonathan Miller	Mgmt	For	For	For
1.8	Elect Director Madhu Ranganathan	Mgmt	For	For	For
1.9	Elect Director Ben Verwaayen	Mgmt	For	For	For



Akamai Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4A	Eliminate Supermajority Vote Requirement to Amend Provisions in Article Tenth	Mgmt	For	For	For
4B	Eliminate Supermajority Vote Requirement to Amend Provisions in Article Eleventh	Mgmt	For	For	For
4C	Eliminate Supermajority Vote Requirement to Amend Provisions in Article Twelfth	Mgmt	For	For	For
5	Adjourn Meeting	Mgmt	For	Against	Against
6	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
7	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	Against	Against
8	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

American International Group, Inc.

Meeting Date: 05/14/2025

Record Date: 03/17/2025

Primary Security ID: 026874784

Country: USA

Meeting Type: Annual

Ticker: AIG

Shares Voted: 3,039

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paola Bergamaschi	Mgmt	For	For	For
1b	Elect Director James Cole, Jr.	Mgmt	For	For	For
1c	Elect Director James (Jimmy) Dunne, III	Mgmt	For	Against	Against
1d	Elect Director John (Chris) Inglis	Mgmt	For	For	For
1e	Elect Director Courtney Leimkuhler	Mgmt	For	For	For
1f	Elect Director Linda A. Mills	Mgmt	For	Against	Against
1g	Elect Director Diana M. Murphy	Mgmt	For	Against	Against
1h	Elect Director Juan Perez	Mgmt	For	For	For
1i	Elect Director Peter R. Porrino	Mgmt	For	For	For
1j	Elect Director John G. Rice	Mgmt	For	For	For

American International Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Vanessa A. Wittman	Mgmt	For	For	For
1l	Elect Director Peter Zaffino	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

American Tower Corporation

Meeting Date: 05/14/2025

Country: USA

Ticker: AMT

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 03027X100

Shares Voted: 2,289

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Steven O. Vondran	Mgmt	For	For	For
1b	Elect Director Kelly C. Chambliss	Mgmt	For	For	For
1c	Elect Director Teresa H. Clarke	Mgmt	For	For	For
1d	Elect Director Kenneth R. Frank	Mgmt	For	For	For
1e	Elect Director Robert D. Hormats	Mgmt	For	For	For
1f	Elect Director Rajesh Kalathur	Mgmt	For	For	For
1g	Elect Director Grace D. Lieblein	Mgmt	For	For	For
1h	Elect Director Craig Macnab	Mgmt	For	For	For
1i	Elect Director Neville R. Ray	Mgmt	For	For	For
1j	Elect Director Pamela D. A. Reeve	Mgmt	For	For	For
1k	Elect Director Bruce L. Tanner	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

## American Water Works Company, Inc.

Meeting Date: 05/14/2025

Record Date: 03/17/2025

Primary Security ID: 030420103

Country: USA

Meeting Type: Annual

Ticker: AWK

Shares Voted: 934

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey N. Edwards	Mgmt	For	For	For
1b	Elect Director John C. Griffith	Mgmt	For	For	For
1c	Elect Director Laurie P. Havanec	Mgmt	For	For	For
1d	Elect Director Julia L. Johnson	Mgmt	For	For	For
1e	Elect Director Patricia L. Kampling	Mgmt	For	For	For
1f	Elect Director Karl F. Kurz	Mgmt	For	For	For
1g	Elect Director Michael L. Marberry	Mgmt	For	For	For
1h	Elect Director Stuart M. McGuigan	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Celanese Corporation

Meeting Date: 05/14/2025

Record Date: 03/17/2025

Primary Security ID: 150870103

Country: USA

Meeting Type: Annual

Ticker: CE

Shares Voted: 480

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Bruce E. Chinn	Mgmt	For	For	For
1b	Elect Director Edward G. Galante	Mgmt	For	For	For
1c	Elect Director Timothy Go	Mgmt	For	For	For
1d	Elect Director Kathryn M. Hill	Mgmt	For	For	For
1e	Elect Director David F. Hoffmeister	Mgmt	For	For	For
1f	Elect Director Jay V. Ihlenfeld	Mgmt	For	For	For
1g	Elect Director Deborah J. Kissire	Mgmt	For	For	For

Celanese Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Michael Koenig	Mgmt	For	For	For
1i	Elect Director Christopher J. Kuehn	Mgmt	For	For	For
1j	Elect Director Ganesh Moorthy	Mgmt	For	For	For
1k	Elect Director Scott A. Richardson	Mgmt	For	For	For
1l	Elect Director Kim K.W. Rucker	Mgmt	For	For	For
1m	Elect Director Scott M. Sutton	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4a	Eliminate Supermajority Vote Requirement to Amend Bylaws	Mgmt	For	For	For
4b	Eliminate Supermajority Vote Requirement to Allow Future Amendments in the Certificate of Incorporation	Mgmt	For	For	For
4c	Eliminate Supermajority Vote Requirement to Allow Filling of Open Board Seats	Mgmt	For	For	For
4d	Eliminate Supermajority Vote Requirement to Remove Directors	Mgmt	For	For	For
5	Adopt Simple Majority Vote	SH	Against	For	For

Elevance Health, Inc.

Meeting Date: 05/14/2025

Record Date: 03/17/2025

Primary Security ID: 036752103

Country: USA

Meeting Type: Annual

Ticker: ELV

Shares Voted: 1,135

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Susan D. DeVore	Mgmt	For	For	For
1.2	Elect Director Bahija Jallal	Mgmt	For	For	For
1.3	Elect Director Ryan M. Schneider	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Elevance Health, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Effectiveness of Diversity, Equity, and Inclusion Efforts	SH	Against	Against	Against

Everest Group, Ltd.

**Meeting Date:** 05/14/2025

**Country:** Bermuda

**Ticker:** EG

**Record Date:** 03/17/2025

**Meeting Type:** Annual

**Primary Security ID:** G3223R108

Shares Voted: 147

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John J. Amore	Mgmt	For	For	For
1.2	Elect Director William F. Galtney Jr.	Mgmt	For	For	For
1.3	Elect Director John A. Graf	Mgmt	For	For	For
1.4	Elect Director Meryl Hartzband	Mgmt	For	For	For
1.5	Elect Director John Howard	Mgmt	For	For	For
1.6	Elect Director Gerri Losquadro	Mgmt	For	For	For
1.7	Elect Director Hazel McNeilage	Mgmt	For	For	For
1.8	Elect Director Roger M. Singer	Mgmt	For	For	For
1.9	Elect Director Jim Williamson	Mgmt	For	For	For
2	Approve KPMG as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Amend Bye-Laws	Mgmt	For	For	For

First Solar, Inc.

**Meeting Date:** 05/14/2025

**Country:** USA

**Ticker:** FSLR

**Record Date:** 03/20/2025

**Meeting Type:** Annual

**Primary Security ID:** 336433107

First Solar, Inc.

Shares Voted: 13

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael J. Ahearn	Mgmt	For	For	For
1.2	Elect Director Anita Marangoly George	Mgmt	For	For	For
1.3	Elect Director Lisa A. Kro	Mgmt	For	For	For
1.4	Elect Director William J. Post	Mgmt	For	For	For
1.5	Elect Director Venkata "Murthy" Renduchintala	Mgmt	For	For	For
1.6	Elect Director Paul H. Stebbins	Mgmt	For	For	For
1.7	Elect Director Michael Sweeney	Mgmt	For	For	For
1.8	Elect Director Mark R. Widmar	Mgmt	For	For	For
1.9	Elect Director Norman L. Wright	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

Fiserv, Inc.

Meeting Date: 05/14/2025Country: USATicker: FI

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: 337738108

Shares Voted: 2,783

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Frank J. Bisignano *Withdrawn Resolution*	Mgmt			
1.2	Elect Director Stephanie E. Cohen	Mgmt	For	For	For
1.3	Elect Director Henrique de Castro	Mgmt	For	For	For
1.4	Elect Director Harry F. DiSimone	Mgmt	For	For	For
1.5	Elect Director Lance M. Fritz	Mgmt	For	For	For
1.6	Elect Director Ajei S. Gopal	Mgmt	For	For	For
1.7	Elect Director Michael P. Lyons	Mgmt	For	For	For

Fiserv, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Wafaa Mamilli	Mgmt	For	For	For
1.9	Elect Director Doyle R. Simons	Mgmt	For	For	For
1.10	Elect Director Kevin M. Warren	Mgmt	For	For	For
1.11	Elect Director Charlotte B. Yarkoni	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against

GE Vernova, Inc.

Meeting Date: 05/14/2025

Record Date: 03/21/2025

Primary Security ID: 36828A101

Country: USA

Meeting Type: Annual

Ticker: GEV

Shares Voted: 1,354

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Steve Angel	Mgmt	For	For	For
1b	Elect Director Arnold W. Donald	Mgmt	For	For	For
1c	Elect Director Jesus Malave	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Hess Corporation

Meeting Date: 05/14/2025

Record Date: 03/21/2025

Primary Security ID: 42809H107

Country: USA

Meeting Type: Annual

Ticker: HES

Shares Voted: 1,402

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Terrence J. Checki	Mgmt	For	For	For

Hess Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Leonard S. Coleman, Jr.	Mgmt	For	For	For
1c	Elect Director Lisa Glatch	Mgmt	For	For	For
1d	Elect Director John B. Hess	Mgmt	For	For	For
1e	Elect Director Edith E. Holiday	Mgmt	For	For	For
1f	Elect Director Marc S. Lipschultz	Mgmt	For	For	For
1g	Elect Director Raymond J. McGuire	Mgmt	For	For	For
1h	Elect Director David McManus	Mgmt	For	For	For
1i	Elect Director Kevin O. Meyers	Mgmt	For	For	For
1j	Elect Director Karyn F. Ovelmen	Mgmt	For	For	For
1k	Elect Director James H. Quigley	Mgmt	For	For	For
1l	Elect Director William G. Schrader	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Hilton Worldwide Holdings Inc.

Meeting Date: 05/14/2025

Record Date: 03/21/2025

Primary Security ID: 43300A203

Country: USA

Meeting Type: Annual

Ticker: HLT

Shares Voted: 1,183					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Christopher J. Nassetta	Mgmt	For	For	For
1b	Elect Director Jonathan D. Gray	Mgmt	For	For	For
1c	Elect Director Charlene T. Begley	Mgmt	For	For	For
1d	Elect Director Chris Carr	Mgmt	For	For	For
1e	Elect Director Melanie L. Healey	Mgmt	For	For	For
1f	Elect Director Raymond E. Mabus, Jr.	Mgmt	For	For	For
1g	Elect Director Marissa A. Mayer	Mgmt	For	For	For
1h	Elect Director Elizabeth A. Smith	Mgmt	For	For	For



Hilton Worldwide Holdings Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Douglas M. Steenland	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For

Simon Property Group, Inc.

Meeting Date: 05/14/2025

Record Date: 03/17/2025

Primary Security ID: 828806109

Country: USA

Meeting Type: Annual

Ticker: SPG

Shares Voted: 1,571

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Glyn F. Aeppel	Mgmt	For	Against	Against
1B	Elect Director Larry C. Glasscock	Mgmt	For	Against	Against
1C	Elect Director Nina P. Jones	Mgmt	For	For	For
1D	Elect Director Reuben S. Leibowitz	Mgmt	For	For	For
1E	Elect Director Randall J. Lewis	Mgmt	For	For	For
1F	Elect Director Gary M. Rodkin	Mgmt	For	Against	Against
1G	Elect Director Peggy Fang Roe	Mgmt	For	Against	Against
1H	Elect Director Stefan M. Selig	Mgmt	For	For	For
1I	Elect Director Daniel C. Smith	Mgmt	For	For	For
1J	Elect Director Marta R. Stewart	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Change State of Incorporation from Delaware to Indiana	Mgmt	For	Against	Against

Skyworks Solutions, Inc.

Meeting Date: 05/14/2025

Record Date: 03/20/2025

Primary Security ID: 83088M102

Country: USA

Meeting Type: Annual

Ticker: SWKS

Shares Voted: 766

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Christine King	Mgmt	For	For	For
1b	Elect Director Alan S. Batey	Mgmt	For	For	For
1c	Elect Director Kevin L. Beebe	Mgmt	For	For	For
1d	Elect Director Philip G. Brace	Mgmt	For	For	For
1e	Elect Director Eric J. Guerin	Mgmt	For	For	For
1f	Elect Director Suzanne E. McBride	Mgmt	For	For	For
1g	Elect Director David P. McGlade	Mgmt	For	For	For
1h	Elect Director Robert A. Schriesheim	Mgmt	For	For	For
1i	Elect Director Maryann Turcke	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Adopt Simple Majority Vote	SH	None	For	For
5	Disclose All Material Scope 3 GHG Emissions	SH	Against	Against	Against

Southwest Airlines Co.

Meeting Date: 05/14/2025

Record Date: 03/18/2025

Primary Security ID: 844741108

Country: USA

Meeting Type: Annual

Ticker: LUV

Shares Voted: 475

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lisa M. Atherton	Mgmt	For	For	For
1b	Elect Director Pierre R. Breber	Mgmt	For	For	For
1c	Elect Director Douglas H. Brooks	Mgmt	For	For	For
1d	Elect Director C. David Cush	Mgmt	For	For	For
1e	Elect Director Sarah E. Feinberg	Mgmt	For	For	For
1f	Elect Director Robert L. Fornaro	Mgmt	For	For	For

Southwest Airlines Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Rakesh Gangwal	Mgmt	For	For	For
1h	Elect Director David J. Grissen	Mgmt	For	For	For
1i	Elect Director David P. Hess	Mgmt	For	For	For
1j	Elect Director Robert E. Jordan	Mgmt	For	For	For
1k	Elect Director Christopher P. Reynolds	Mgmt	For	For	For
1l	Elect Director Gregg A. Saretsky	Mgmt	For	For	For
1m	Elect Director Patricia A. Watson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against

State Street Corporation

Meeting Date: 05/14/2025Country: USATicker: STT

Record Date: 03/14/2025Meeting Type: Annual

Primary Security ID: 857477103

Shares Voted: 1,427

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marie A. Chandoha	Mgmt	For	For	For
1b	Elect Director DonnaLee A. DeMaio	Mgmt	For	For	For
1c	Elect Director Amelia C. Fawcett	Mgmt	For	For	For
1d	Elect Director William C. Freda	Mgmt	For	For	For
1e	Elect Director Patricia M. Halliday	Mgmt	For	For	For
1f	Elect Director Sara Mathew	Mgmt	For	For	For
1g	Elect Director William L. Meaney	Mgmt	For	For	For
1h	Elect Director Ronald P. O'Hanley	Mgmt	For	For	For
1i	Elect Director Sean P. O'Sullivan	Mgmt	For	For	For
1j	Elect Director Julio A. Portalatin	Mgmt	For	For	For

## State Street Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director John B. Rhea	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against
5	Report on "Just Transition"	SH	Against	Against	Against

## Veralto Corp.

Meeting Date: 05/14/2025	Country: USA	Ticker: VLTO
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 92338C103		

Shares Voted: 1,060

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Daniel L. Comas	Mgmt	For	For	For
1b	Elect Director Walter G. Lohr, Jr.	Mgmt	For	For	For
1c	Elect Director John T. Schwieters	Mgmt	For	For	For
1d	Elect Director Cindy L. Wallis-Lage	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4a	Declassify the Board of Directors	Mgmt	For	For	For
4b	Eliminate Supermajority Vote Requirement to Amend Certificate of Incorporation	Mgmt	For	For	For

## Vertex Pharmaceuticals Incorporated

Meeting Date: 05/14/2025	Country: USA	Ticker: VRTX
Record Date: 03/17/2025	Meeting Type: Annual	
Primary Security ID: 92532F100		

Vertex Pharmaceuticals Incorporated

Shares Voted: 1,264

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Sangeeta N. Bhatia	Mgmt	For	For	For
1.2	Elect Director Lloyd Carney	Mgmt	For	For	For
1.3	Elect Director Alan Garber	Mgmt	For	For	For
1.4	Elect Director Reshma Kewalramani	Mgmt	For	For	For
1.5	Elect Director Michel Lagarde	Mgmt	For	For	For
1.6	Elect Director Jeffrey M. Leiden	Mgmt	For	For	For
1.7	Elect Director Diana McKenzie	Mgmt	For	For	For
1.8	Elect Director Bruce I. Sachs	Mgmt	For	For	For
1.9	Elect Director Jennifer Schneider	Mgmt	For	For	For
1.10	Elect Director Nancy Thornberry	Mgmt	For	For	For
1.11	Elect Director Suketu Upadhyay	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Altria Group, Inc.

Meeting Date: 05/15/2025Country: USATicker: MO

Record Date: 03/25/2025Meeting Type: Annual

Primary Security ID: 02209S103

Shares Voted: 8,241

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ian L.T. Clarke	Mgmt	For	For	For
1b	Elect Director Marjorie M. Connelly	Mgmt	For	For	For
1c	Elect Director R. Matt Davis	Mgmt	For	For	For
1d	Elect Director William F. Gifford, Jr.	Mgmt	For	For	For
1e	Elect Director Debra J. Kelly-Ennis	Mgmt	For	For	For

Altria Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Kathryn B. McQuade	Mgmt	For	For	For
1g	Elect Director George Munoz	Mgmt	For	For	For
1h	Elect Director Virginia E. Shanks	Mgmt	For	For	For
1i	Elect Director Richard S. Stoddart	Mgmt	For	For	For
1j	Elect Director Ellen R. Strahlman	Mgmt	For	For	For
1k	Elect Director M. Max Yzaguirre	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Approve Non-Employee Director Omnibus Stock Plan	Mgmt	For	For	For

Amphenol Corporation

Meeting Date: 05/15/2025

Country: USA

Ticker: APH

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 032095101

Shares Voted: 5,841

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nancy A. Altobello	Mgmt	For	For	For
1.2	Elect Director David P. Falck	Mgmt	For	For	For
1.3	Elect Director Rita S. Lane	Mgmt	For	For	For
1.4	Elect Director Robert A. Livingston	Mgmt	For	For	For
1.5	Elect Director Martin H. Loeffler	Mgmt	For	For	For
1.6	Elect Director R. Adam Norwitt	Mgmt	For	For	For
1.7	Elect Director Prahlad Singh	Mgmt	For	For	For
1.8	Elect Director Anne Clarke Wolff	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Amphenol Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Increase Authorized Common Stock	Mgmt	For	For	For
5	Amend Right to Call Special Meeting	SH	Against	Against	Against

AT&T Inc.

Meeting Date: 05/15/2025Country: USATicker: T

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: 00206R102

Shares Voted: 35,384

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Scott T. Ford	Mgmt	For	For	For
1.2	Elect Director William E. Kennard	Mgmt	For	For	For
1.3	Elect Director Stephen J. Luczo	Mgmt	For	For	For
1.4	Elect Director Marissa A. Mayer	Mgmt	For	For	For
1.5	Elect Director Michael B. McCallister	Mgmt	For	For	For
1.6	Elect Director Beth E. Mooney	Mgmt	For	For	For
1.7	Elect Director Matthew K. Rose	Mgmt	For	For	For
1.8	Elect Director John T. Stankey	Mgmt	For	For	For
1.9	Elect Director Cynthia B. Taylor	Mgmt	For	For	For
1.10	Elect Director Luis A. Ubiñas	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

BlackRock, Inc.

Meeting Date: 05/15/2025Country: USATicker: BLK

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

Primary Security ID: 09290D101

Shares Voted: 761

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Pamela Daley	Mgmt	For	For	For

BlackRock, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Laurence D. Fink	Mgmt	For	For	For
1c	Elect Director Gregory J. Fleming	Mgmt	For	For	For
1d	Elect Director William E. Ford	Mgmt	For	For	For
1e	Elect Director Fabrizio Freda	Mgmt	For	For	For
1f	Elect Director Murry S. Gerber	Mgmt	For	For	For
1g	Elect Director Margaret "Peggy" L. Johnson	Mgmt	For	For	For
1h	Elect Director Robert S. Kapito	Mgmt	For	For	For
1i	Elect Director Cheryl D. Mills	Mgmt	For	For	For
1j	Elect Director Kathleen Murphy	Mgmt	For	For	For
1k	Elect Director Amin H. Nasser	Mgmt	For	For	For
1l	Elect Director Gordon M. Nixon	Mgmt	For	For	For
1m	Elect Director Adebayo O. Ogunlesi	Mgmt	For	For	For
1n	Elect Director Kristin C. Peck	Mgmt	For	For	For
1o	Elect Director Charles H. Robbins	Mgmt	For	For	For
1p	Elect Director Hans E. Vestberg	Mgmt	For	For	For
1q	Elect Director Susan L. Wagner	Mgmt	For	For	For
1r	Elect Director Mark Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Risks of Stakeholder Capitalism	SH	Against	Against	Against
5	Require More Director Nominations Than Open Seats	SH	Against	Against	Against

Bunge Global SA

Meeting Date: 05/15/2025

Record Date: 03/14/2025

Primary Security ID: H11356104

Country: Switzerland

Meeting Type: Annual

Ticker: BG

Shares Voted: 744					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For



Bunge Global SA

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Approve Treatment of Net Loss	Mgmt	For	For	For
3	Approve Dividends of USD 2.80 per Share from Capital Contribution Reserves	Mgmt	For	For	For
4	Approve Discharge of Board and Senior Management	Mgmt	For	For	For
5a	Elect Director Eliane Aleixo Lustosa de Andrade	Mgmt	For	For	For
5b	Elect Director Carol Browner	Mgmt	For	For	For
5c	Elect Director Gregory Heckman	Mgmt	For	For	For
5d	Elect Director Linda Jojo	Mgmt	For	For	For
5e	Elect Director Monica McGurk	Mgmt	For	For	For
5f	Elect Director Kenneth Simril	Mgmt	For	For	For
5g	Elect Director Henry "Jay" Winship	Mgmt	For	For	For
5h	Elect Director Mark Zenuk	Mgmt	For	For	For
5i	Elect Director Adrian Isman	Mgmt	For	For	For
5j	Elect Director Anne Jensen	Mgmt	For	For	For
5k	Elect Director Christopher Mahoney	Mgmt	For	For	For
5l	Elect Director Markus Walt	Mgmt	For	For	For
6a	Reelect Mark Zenuk as Board Chairman	Mgmt	For	For	For
7a	Reelect Monica McGurk as Member of the Human Resources and Compensation Committee	Mgmt	For	For	For
7b	Reelect Kenneth Simril as Member of the Human Resources and Compensation Committee	Mgmt	For	For	For
7c	Reelect Markus Walt as Member of the Human Resources and Compensation Committee	Mgmt	For	For	For
7d	Reelect Henry "Jay" Winship as Member of the Human Resources and Compensation Committee	Mgmt	For	For	For
8	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
9a	Approve Remuneration of Directors in the Amount of USD 5.4 million	Mgmt	For	For	For

Bunge Global SA

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
9b	Approve Remuneration of Executive Committee in the Amount of USD 38.9 million for Fiscal Year 2026	Mgmt	For	For	For
9c	Approve Remuneration Report	Mgmt	For	For	For
10	Approve Non-Financial Report	Mgmt	For	For	For
11	Designate Wuersch & Gering LLP as Independent Proxy	Mgmt	For	For	For
12	Appoint Deloitte & Touche LLP as Auditor and Reelect Deloitte SA as Swiss Statutory Auditor	Mgmt	For	For	For
A	Other Business	Mgmt	For	Against	Against

Cheniere Energy, Inc.

Meeting Date: 05/15/2025Country: USATicker: LNG

Record Date: 03/31/2025Meeting Type: Annual

Primary Security ID: 16411R208

Shares Voted: 1,095

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director G. Andrea Botta	Mgmt	For	For	For
1b	Elect Director Jack A. Fusco	Mgmt	For	For	For
1c	Elect Director Patricia K. Collawn	Mgmt	For	For	For
1d	Elect Director Brian E. Edwards	Mgmt	For	For	For
1e	Elect Director Denise Gray	Mgmt	For	For	For
1f	Elect Director Lorraine Mitchelmore	Mgmt	For	For	For
1g	Elect Director W. Benjamin Moreland	Mgmt	For	For	For
1h	Elect Director Donald F. Robillard, Jr.	Mgmt	For	For	For
1i	Elect Director Matthew Runkle	Mgmt	For	For	For
1j	Elect Director Neal A. Shear	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Meeting Date: 05/15/2025	Country: Switzerland	Ticker: CB
Record Date: 03/21/2025	Meeting Type: Annual	
Primary Security ID: H1467J104		

Shares Voted: 1,987

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For
2.1	Allocate Disposable Profit	Mgmt	For	For	For
2.2	Approve Dividend Distribution From Legal Reserves Through Capital Contributions Reserve Subaccount	Mgmt	For	For	For
3	Approve Discharge of Board of Directors	Mgmt	For	For	For
4.1	Ratify PricewaterhouseCoopers AG (Zurich) as Statutory Auditor	Mgmt	For	For	For
4.2	Ratify PricewaterhouseCoopers LLP (United States) as Independent Registered Accounting Firm	Mgmt	For	For	For
4.3	Ratify BDO AG (Zurich) as Special Audit Firm	Mgmt	For	For	For
5.1	Elect Director Evan G. Greenberg	Mgmt	For	For	For
5.2	Elect Director Michael P. Connors	Mgmt	For	For	For
5.3	Elect Director Michael G. Atieh	Mgmt	For	For	For
5.4	Elect Director Nancy K. Buese	Mgmt	For	For	For
5.5	Elect Director Sheila P. Burke	Mgmt	For	For	For
5.6	Elect Director Nelson J. Chai	Mgmt	For	For	For
5.7	Elect Director Michael L. Corbat	Mgmt	For	For	For
5.8	Elect Director Fred Hu	Mgmt	For	For	For
5.9	Elect Director Robert J. Hugin	Mgmt	For	For	For
5.10	Elect Director Robert W. Scully	Mgmt	For	For	For
5.11	Elect Director Theodore E. Shasta	Mgmt	For	For	For
5.12	Elect Director David H. Sidwell	Mgmt	For	For	For
5.13	Elect Director Olivier Steimer	Mgmt	For	For	For
5.14	Elect Director Frances F. Townsend	Mgmt	For	For	For
6	Elect Evan G. Greenberg as Board Chairman	Mgmt	For	Against	Against

Chubb Limited

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
7.1	Elect Michael P. Connors as Member of the Compensation Committee	Mgmt	For	For	For
7.2	Elect Michael L. Corbat as Member of the Compensation Committee	Mgmt	For	For	For
7.3	Elect David H. Sidwell as Member of the Compensation Committee	Mgmt	For	For	For
7.4	Elect Frances F. Townsend as Member of the Compensation Committee	Mgmt	For	For	For
8	Designate Homburger AG as Independent Proxy	Mgmt	For	For	For
9	Approve Renewal of a Capital Band for Authorized Share Capital Increases and Reductions	Mgmt	For	For	For
10.1	Approve Remuneration of Directors in the Amount of USD 6.5 Million	Mgmt	For	For	For
10.2	Approve Remuneration of Executive Management in the Amount of USD 78 Million for Fiscal 2026	Mgmt	For	For	For
10.3	Approve Remuneration Report	Mgmt	For	For	For
11	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
12	Approve Sustainability Report	Mgmt	For	For	For
13	Report on GHG Emissions Associated with Underwriting, Insuring, and Investment Activities	SH	Against	Against	Against
A	Transact Other Business	Mgmt	For	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: 6,217

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Fernando Aguirre	Mgmt	For	For	For
1b	Elect Director Jeffrey R. Balser	Mgmt	For	For	For

## CVS Health Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director C. David Brown, II	Mgmt	For	For	For
1d	Elect Director Alecia A. DeCoudreaux	Mgmt	For	For	For
1e	Elect Director Roger N. Farah	Mgmt	For	For	For
1f	Elect Director Anne M. Finucane	Mgmt	For	For	For
1g	Elect Director J. David Joyner	Mgmt	For	For	For
1h	Elect Director J. Scott Kirby	Mgmt	For	For	For
1i	Elect Director Michael F. Mahoney	Mgmt	For	For	For
1j	Elect Director Leslie V. Norwalk	Mgmt	For	For	For
1k	Elect Director Larry M. Robbins	Mgmt	For	For	For
1l	Elect Director Guy P. Sansone	Mgmt	For	For	For
1m	Elect Director Douglas H. Shulman	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Against	For	For

## Invitation Homes Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: INVH
Record Date: 03/20/2025	Meeting Type: Annual	
Primary Security ID: 46187W107		

Shares Voted: 2,766

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael D. Fascitelli	Mgmt	For	For	For
1.2	Elect Director Dallas B. Tanner	Mgmt	For	For	For
1.3	Elect Director Jana Cohen Barbe	Mgmt	For	For	For
1.4	Elect Director H. Wyman Howard, III	Mgmt	For	For	For
1.5	Elect Director Jeffrey E. Kelter	Mgmt	For	For	For
1.6	Elect Director Kellyn Smith Kenny	Mgmt	For	For	For

Invitation Homes Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Joseph D. Margolis	Mgmt	For	For	For
1.8	Elect Director John B. Rhea	Mgmt	For	For	For
1.9	Elect Director Frances Aldrich Sevilla-Sacasa	Mgmt	For	For	For
1.10	Elect Director Keith D. Taylor	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year

KeyCorp

Meeting Date: 05/15/2025	Country: USA	Ticker: KEY
Record Date: 03/21/2025	Meeting Type: Annual	
Primary Security ID: 493267108		

Shares Voted: 5,453

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jacqueline L. Allard	Mgmt	For	For	For
1.2	Elect Director Alexander M. Cutler	Mgmt	For	For	For
1.3	Elect Director H. James Dallas	Mgmt	For	For	For
1.4	Elect Director Elizabeth R. Gile	Mgmt	For	For	For
1.5	Elect Director Ruth Ann M. Gillis	Mgmt	For	For	For
1.6	Elect Director Christopher M. Gorman	Mgmt	For	For	For
1.7	Elect Director Robin N. Hayes	Mgmt	For	For	For
1.8	Elect Director Carlton L. Highsmith	Mgmt	For	For	For
1.9	Elect Director Richard J. Hipple	Mgmt	For	For	For
1.10	Elect Director Somesh Khanna	Mgmt	For	For	For
1.11	Elect Director Devina A. Rankin	Mgmt	For	For	For
1.12	Elect Director Barbara R. Snyder	Mgmt	For	For	For
1.13	Elect Director Richard J. Tobin	Mgmt	For	For	For
1.14	Elect Director Todd J. Vasos	Mgmt	For	For	For

KeyCorp

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.15	Elect Director David K. Wilson	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Kinder Morgan, Inc.

**Meeting Date:** 05/15/2025

**Country:** USA

**Ticker:** KMI

**Record Date:** 03/17/2025

**Meeting Type:** Annual

**Primary Security ID:** 49456B101

Shares Voted: 9,518

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Richard D. Kinder	Mgmt	For	For	For
1.2	Elect Director Kimberly A. Dang	Mgmt	For	For	For
1.3	Elect Director Amy W. Chronis	Mgmt	For	For	For
1.4	Elect Director Ted A. Gardner	Mgmt	For	For	For
1.5	Elect Director Anthony W. Hall, Jr.	Mgmt	For	For	For
1.6	Elect Director Steven J. Kean	Mgmt	For	For	For
1.7	Elect Director Michael C. Morgan	Mgmt	For	For	For
1.8	Elect Director Arthur C. Reichstetter	Mgmt	For	For	For
1.9	Elect Director C. Park Shaper	Mgmt	For	For	For
1.10	Elect Director William A. Smith	Mgmt	For	For	For
1.11	Elect Director Robert F. Vagt	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Labcorp Holdings Inc.

**Meeting Date:** 05/15/2025

**Country:** USA

**Ticker:** LH

**Record Date:** 03/20/2025

**Meeting Type:** Annual

**Primary Security ID:** 504922105

Labcorp Holdings Inc.

Shares Voted: 402

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kerrii B. Anderson	Mgmt	For	For	For
1b	Elect Director Jeffrey A. Davis	Mgmt	For	For	For
1c	Elect Director D. Gary Gilliland	Mgmt	For	For	For
1d	Elect Director Kirsten M. Kliphouse	Mgmt	For	For	For
1e	Elect Director Garheng Kong	Mgmt	For	For	For
1f	Elect Director Peter M. Neupert	Mgmt	For	For	For
1g	Elect Director Richelle P. Parham	Mgmt	For	For	For
1h	Elect Director Paul B. Rothman	Mgmt	For	For	For
1i	Elect Director Adam H. Schechter	Mgmt	For	For	For
1j	Elect Director Kathryn E. Wengel	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Las Vegas Sands Corp.

Meeting Date: 05/15/2025Country: USATicker: LVS

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: 517834107

Shares Voted: 1,720

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert G. Goldstein	Mgmt	For	Withhold	Withhold
1.2	Elect Director Patrick Dumont	Mgmt	For	Withhold	Withhold
1.3	Elect Director Mark Besca	Mgmt	For	For	For
1.4	Elect Director Irwin Chafetz	Mgmt	For	Withhold	Withhold
1.5	Elect Director Micheline Chau	Mgmt	For	Withhold	Withhold
1.6	Elect Director Charles D. Forman	Mgmt	For	Withhold	Withhold



Las Vegas Sands Corp.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Lewis Kramer	Mgmt	For	Withhold	Withhold
1.8	Elect Director Alain Li	Mgmt	For	Withhold	Withhold
1.9	Elect Director Micky Pant	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Marsh & McLennan Companies, Inc.

Meeting Date: 05/15/2025

Record Date: 03/17/2025

Primary Security ID: 571748102

Country: USA

Meeting Type: Annual

Ticker: MMC

Shares Voted: 2,424

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony K. Anderson	Mgmt	For	For	For
1b	Elect Director John Q. Doyle	Mgmt	For	For	For
1c	Elect Director H. Edward Hanway	Mgmt	For	For	For
1d	Elect Director Judith Hartmann	Mgmt	For	For	For
1e	Elect Director Deborah C. Hopkins	Mgmt	For	For	For
1f	Elect Director Tamara Ingram	Mgmt	For	For	For
1g	Elect Director Jane H. Lute	Mgmt	For	For	For
1h	Elect Director Steven A. Mills	Mgmt	For	For	For
1i	Elect Director Morton O. Schapiro	Mgmt	For	For	For
1j	Elect Director Jan Siegmund	Mgmt	For	For	For
1k	Elect Director Lloyd M. Yates	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	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: 283

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

Morgan Stanley

Meeting Date: 05/15/2025

Record Date: 03/17/2025

Primary Security ID: 617446448

Country: USA

Meeting Type: Annual

Ticker: MS

Shares Voted: 6,063

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Megan Butler	Mgmt	For	For	For
1b	Elect Director Thomas H. Glocer	Mgmt	For	For	For
1c	Elect Director Robert H. Herz	Mgmt	For	For	For
1d	Elect Director Erika H. James	Mgmt	For	For	For
1e	Elect Director Hironori Kamezawa	Mgmt	For	For	For
1f	Elect Director Shelley B. Leibowitz	Mgmt	For	For	For

Morgan Stanley

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Jami Miscik	Mgmt	For	For	For
1h	Elect Director Masato Miyachi	Mgmt	For	For	For
1i	Elect Director Dennis M. Nally	Mgmt	For	For	For
1j	Elect Director Douglas L. Peterson	Mgmt	For	For	For
1k	Elect Director Edward Pick	Mgmt	For	For	For
1l	Elect Director Mary L. Schapiro	Mgmt	For	For	For
1m	Elect Director Perry M. Traquina	Mgmt	For	For	For
1n	Elect Director Rayford Wilkins, Jr.	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Report Annually on Energy Supply Ratio	SH	Against	Against	Against

Motorola Solutions, Inc.

Meeting Date: 05/15/2025

Country: USA

Ticker: MSI

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 620076307

Shares Voted: 819					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gregory Q. Brown	Mgmt	For	For	For
1b	Elect Director Nicole Anasenes	Mgmt	For	For	For
1c	Elect Director Kenneth D. Denman	Mgmt	For	For	For
1d	Elect Director Ayanna M. Howard	Mgmt	For	For	For
1e	Elect Director Elizabeth D. Mann	Mgmt	For	For	For
1f	Elect Director Gregory K. Mondre	Mgmt	For	For	For
1g	Elect Director Joseph M. Tucci	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Motorola Solutions, Inc.

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

ON Semiconductor Corporation

Meeting Date: 05/15/2025Country: USATicker: ON

Record Date: 03/18/2025Meeting Type: Annual

Primary Security ID: 682189105

Shares Voted: 2,065

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Alan Campbell	Mgmt	For	For	For
1b	Elect Director Susan K. Carter	Mgmt	For	For	For
1c	Elect Director Thomas L. Deitrich	Mgmt	For	For	For
1d	Elect Director Hassane El-Khoury	Mgmt	For	For	For
1e	Elect Director Bruce E. Kiddoo	Mgmt	For	For	For
1f	Elect Director Paul A. Mascarenas	Mgmt	For	For	For
1g	Elect Director Gregory L. Waters	Mgmt	For	For	For
1h	Elect Director Christine Y. Yan	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

O'Reilly Automotive, Inc.

Meeting Date: 05/15/2025Country: USATicker: ORLY

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

Primary Security ID: 67103H107

Shares Voted: 275

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Greg Henslee	Mgmt	For	For	For
1b	Elect Director David O'Reilly	Mgmt	For	For	For
1c	Elect Director Thomas T. Hendrickson	Mgmt	For	For	For

O'Reilly Automotive, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Kimberly A. deBeers	Mgmt	For	For	For
1e	Elect Director Gregory D. Johnson	Mgmt	For	For	For
1f	Elect Director John R. Murphy	Mgmt	For	For	For
1g	Elect Director Dana M. Perlman	Mgmt	For	For	For
1h	Elect Director Maria A. Sastre	Mgmt	For	For	For
1i	Elect Director Fred Whitfield	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Increase Authorized Common Stock	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Amend Clawback Policy	SH	Against	Against	Against

Otis Worldwide Corporation

Meeting Date: 05/15/2025

Country: USA

Ticker: OTIS

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 68902V107

Shares Voted: 1,965

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Thomas A. Bartlett	Mgmt	For	For	For
1b	Elect Director Jeffrey H. Black	Mgmt	For	For	For
1c	Elect Director Jill C. Brannon	Mgmt	For	For	For
1d	Elect Director Nelda J. Connors	Mgmt	For	For	For
1e	Elect Director Kathy Hopinkah Hannan	Mgmt	For	For	For
1f	Elect Director Shailesh G. Jejurikar	Mgmt	For	For	For
1g	Elect Director Christopher J. Kearney	Mgmt	For	For	For
1h	Elect Director Judith F. Marks	Mgmt	For	For	For
1i	Elect Director Margaret M. V. Preston	Mgmt	For	For	For
1j	Elect Director Shelley Stewart, Jr.	Mgmt	For	For	For
1k	Elect Director John H. Walker	Mgmt	For	For	For

## Otis Worldwide Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on Political Contributions and Expenditures	SH	Against	For	For

## Quest Diagnostics Incorporated

Meeting Date: 05/15/2025	Country: USA	Ticker: DGX
Record Date: 03/17/2025	Meeting Type: Annual	
Primary Security ID: 74834L100		

Shares Voted: 527					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Robert B. Carter	Mgmt	For	For	For
1.2	Elect Director James E. Davis	Mgmt	For	For	For
1.3	Elect Director Luis A. Diaz, Jr.	Mgmt	For	For	For
1.4	Elect Director Tracey C. Doi	Mgmt	For	For	For
1.5	Elect Director Vicky B. Gregg	Mgmt	For	For	For
1.6	Elect Director Wright L. Lassiter, III	Mgmt	For	For	For
1.7	Elect Director Timothy L. Main	Mgmt	For	For	For
1.8	Elect Director Denise M. Morrison	Mgmt	For	For	For
1.9	Elect Director Gary M. Pfeiffer	Mgmt	For	For	For
1.10	Elect Director Timothy M. Ring	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

## Westinghouse Air Brake Technologies Corporation

Meeting Date: 05/15/2025	Country: USA	Ticker: WAB
Record Date: 03/19/2025	Meeting Type: Annual	
Primary Security ID: 929740108		

# Westinghouse Air Brake Technologies Corporation

Shares Voted: 826

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ann R. Klee	Mgmt	For	For	For
1b	Elect Director Albert J. Neupaver	Mgmt	For	For	For
1c	Elect Director Juan Perez	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

# Willis Towers Watson Public Limited Company

Meeting Date: 05/15/2025Country: IrelandTicker: WTW

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: G96629103

Shares Voted: 486

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Dame Inga Beale	Mgmt	For	For	For
1b	Elect Director Fumbi Chima	Mgmt	For	For	For
1c	Elect Director Stephen Chipman	Mgmt	For	For	For
1d	Elect Director Michael Hammond	Mgmt	For	For	For
1e	Elect Director Carl Hess	Mgmt	For	For	For
1f	Elect Director Jacqueline Hunt	Mgmt	For	For	For
1g	Elect Director Paul Reilly	Mgmt	For	For	For
1h	Elect Director Michelle Swanback	Mgmt	For	For	For
1i	Elect Director Fredric Tomczyk	Mgmt	For	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	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Grant Board the Authority to Issue Shares Under Irish Law	Mgmt	For	For	For

Willis Towers Watson Public Limited Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Grant Board the Authority to Opt-Out of Statutory Pre-Emption Rights Under Irish Law	Mgmt	For	For	For

Yum! Brands, Inc.

Meeting Date: 05/15/2025	Country: USA	Ticker: YUM
Record Date: 03/19/2025	Meeting Type: Annual	
Primary Security ID: 988498101		

Shares Voted: 1,380

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paget L. Alves	Mgmt	For	For	For
1b	Elect Director Keith Barr	Mgmt	For	For	For
1c	Elect Director M. Brett Biggs	Mgmt	For	For	For
1d	Elect Director Christopher M. Connor	Mgmt	For	For	For
1e	Elect Director Brian C. Cornell	Mgmt	For	For	For
1f	Elect Director Tanya L. Domier	Mgmt	For	For	For
1g	Elect Director Susan Doniz	Mgmt	For	For	For
1h	Elect Director David W. Gibbs	Mgmt	For	For	For
1i	Elect Director Mirian M. Graddick-Weir	Mgmt	For	For	For
1j	Elect Director Thomas C. Nelson	Mgmt	For	For	For
1k	Elect Director P. Justin Skala	Mgmt	For	For	For
1l	Elect Director Annie Young-Scrivner	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Comply with World Health Organization Guidelines on Antimicrobial Use Throughout Supply Chains	SH	Against	Against	Against
6	Report on Risks Related to Religious Discrimination Against Employees	SH	Against	Against	Against
7	Commission a Third Party Audit on Working Conditions	SH	Against	Against	Against



## Alliant Energy Corporation

Meeting Date: 05/16/2025

Record Date: 03/17/2025

Primary Security ID: 018802108

Country: USA

Meeting Type: Annual

Ticker: LNT

Shares Voted: 1,244

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director N. Joy Falotico	Mgmt	For	For	For
1b	Elect Director Thomas F. O'Toole	Mgmt	For	For	For
1c	Elect Director Christie Raymond	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Disclose Third Party Assessment of GHG Emissions Alignment with Paris Agreement Goals	SH	Against	Against	Against

## 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: 2,823

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

Intercontinental Exchange, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Martha A. Tirinnanzi	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Certificate of Incorporation to Extend Voting Limitations	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

PPL Corporation

Meeting Date: 05/16/2025

Record Date: 03/04/2025

Primary Security ID: 69351T106

Country: USA

Meeting Type: Annual

Ticker: PPL

Shares Voted: 3,502

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Arthur P. Beattie	Mgmt	For	For	For
1b	Elect Director Raja Rajamannar	Mgmt	For	For	For
1c	Elect Director Heather B. Redman	Mgmt	For	For	For
1d	Elect Director Craig A. Rogerson	Mgmt	For	For	For
1e	Elect Director Vincent Sorgi	Mgmt	For	For	For
1f	Elect Director Linda G. Sullivan	Mgmt	For	For	For
1g	Elect Director Natica von Althann	Mgmt	For	For	For
1h	Elect Director Keith H. Williamson	Mgmt	For	For	For
1i	Elect Director Phoebe A. Wood	Mgmt	For	For	For
1j	Elect Director Armando Zagalo de Lima	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Disclose Third Party Assessment of GHG Emissions Alignment with Paris Agreement Goals	SH	Against	Against	Against

Consolidated Edison, Inc.

Meeting Date: 05/19/2025

Record Date: 03/24/2025

Primary Security ID: 209115104

Country: USA

Meeting Type: Annual

Ticker: ED

Shares Voted: 1,730

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Timothy P. Cawley	Mgmt	For	For	For
1b	Elect Director John F. Killian	Mgmt	For	For	For
1c	Elect Director Karol V. Mason	Mgmt	For	For	For
1d	Elect Director Dwight A. McBride	Mgmt	For	For	For
1e	Elect Director William J. Mulrow	Mgmt	For	For	For
1f	Elect Director Michael W. Ranger	Mgmt	For	For	For
1g	Elect Director Linda S. Sanford	Mgmt	For	For	For
1h	Elect Director Deirdre Stanley	Mgmt	For	For	For
1i	Elect Director L. Frederick Sutherland	Mgmt	For	For	For
1j	Elect Director Catherine Zoi	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

DraftKings Inc.

Meeting Date: 05/19/2025

Record Date: 03/21/2025

Primary Security ID: 26142V105

Country: USA

Meeting Type: Annual

Ticker: DKNK

Shares Voted: 2,258

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jason D. Robins	Mgmt	For	Withhold	Withhold
1.2	Elect Director Harry Evans Sloan	Mgmt	For	For	For
1.3	Elect Director Matthew Kalish	Mgmt	For	For	For
1.4	Elect Director Paul Liberman	Mgmt	For	For	For
1.5	Elect Director Woodrow H. Levin	Mgmt	For	Withhold	Withhold
1.6	Elect Director Jocelyn Moore	Mgmt	For	For	For

DraftKings Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Ryan R. Moore	Mgmt	For	For	For
1.8	Elect Director Valerie Mosley	Mgmt	For	Withhold	Withhold
1.9	Elect Director Steven J. Murray	Mgmt	For	For	For
1.10	Elect Director Marni M. Walden	Mgmt	For	Withhold	Withhold
2	Ratify BDO USA, P.C. as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Disclose Board Skills and Diversity Matrix	SH	Against	For	For

Republic Services, Inc.

Meeting Date: 05/19/2025

Record Date: 03/24/2025

Primary Security ID: 760759100

Country: USA

Meeting Type: Annual

Ticker: RSG

Shares Voted: 1,003					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Manny Kadre	Mgmt	For	For	For
1b	Elect Director Michael A. Duffy	Mgmt	For	For	For
1c	Elect Director Thomas W. Handley	Mgmt	For	For	For
1d	Elect Director Jennifer M. Kirk	Mgmt	For	For	For
1e	Elect Director Michael Larson	Mgmt	For	For	For
1f	Elect Director Norman Thomas Linebarger	Mgmt	For	For	For
1g	Elect Director Meg Reynolds	Mgmt	For	For	For
1h	Elect Director James P. Snee	Mgmt	For	For	For
1i	Elect Director Brian S. Tyler	Mgmt	For	For	For
1j	Elect Director Jon Vander Ark	Mgmt	For	For	For
1k	Elect Director Sandra M. Volpe	Mgmt	For	For	For
1l	Elect Director Katharine B. Weymouth	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Republic Services, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Baker Hughes Company

Meeting Date: 05/20/2025	Country: USA	Ticker: BKR
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 05722G100		

Shares Voted: 4,875					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director W. Geoffrey Beattie	Mgmt	For	For	For
1.2	Elect Director Abdulaziz M. Al Gudaimi	Mgmt	For	For	For
1.3	Elect Director Gregory D. Brenneman	Mgmt	For	For	For
1.4	Elect Director Cynthia B. Carroll	Mgmt	For	For	For
1.5	Elect Director Michael R. Dumais	Mgmt	For	For	For
1.6	Elect Director Shirley A. Edwards	Mgmt	For	For	For
1.7	Elect Director Ilham Kadri *Withdrawn Resolution*	Mgmt			
1.8	Elect Director John G. Rice	Mgmt	For	For	For
1.9	Elect Director Lorenzo Simonelli	Mgmt	For	For	For
1.10	Elect Director Mohsen M. Sohi	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

BioMarin Pharmaceutical Inc.

Meeting Date: 05/20/2025	Country: USA	Ticker: BMRN
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 09061G101		

BioMarin Pharmaceutical Inc.

Shares Voted: 908

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Elizabeth McKee Anderson	Mgmt	For	For	For
1B	Elect Director Barbara W. Bodem	Mgmt	For	For	For
1C	Elect Director Athena Countouriotis	Mgmt	For	For	For
1D	Elect Director Willard Dere	Mgmt	For	For	For
1E	Elect Director Mark J. Enyedy	Mgmt	For	For	For
1F	Elect Director Alexander Hardy	Mgmt	For	For	For
1G	Elect Director Maykin Ho	Mgmt	For	For	For
1H	Elect Director Robert J. Hombach	Mgmt	For	For	For
1I	Elect Director Richard A. Meier	Mgmt	For	For	For
1J	Elect Director Timothy P. Walbert	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Burlington Stores, Inc.

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

Record Date: 03/26/2025Meeting Type: Annual

Primary Security ID: 122017106

Shares Voted: 302

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Shira Goodman	Mgmt	For	For	For
1b	Elect Director John J. Mahoney	Mgmt	For	For	For
1c	Elect Director Laura J. Sen	Mgmt	For	For	For
1d	Elect Director Paul J. Sullivan	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

CDW Corporation

Meeting Date: 05/20/2025

Record Date: 03/24/2025

Primary Security ID: 12514G108

Country: USA

Meeting Type: Annual

Ticker: CDW

Shares Voted: 649

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

Honeywell International Inc.

Meeting Date: 05/20/2025

Record Date: 04/01/2025

Primary Security ID: 438516106

Country: USA

Meeting Type: Annual

Ticker: HON

Shares Voted: 3,192

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Duncan B. Angove	Mgmt	For	For	For
1b	Elect Director William S. Ayer	Mgmt	For	For	For
1c	Elect Director Kevin Burke	Mgmt	For	For	For
1d	Elect Director D. Scott Davis	Mgmt	For	For	For

Honeywell International Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Deborah Flint	Mgmt	For	For	For
1f	Elect Director Vimal Kapur	Mgmt	For	For	For
1g	Elect Director Michael W. Lamach	Mgmt	For	For	For
1h	Elect Director Rose Lee	Mgmt	For	For	For
1i	Elect Director Grace Lieblein	Mgmt	For	For	For
1j	Elect Director Robin Watson	Mgmt	For	For	For
1k	Elect Director Stephen Williamson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Approve Liability Management Reorganization	Mgmt	For	For	For
5	Require Independent Board Chair	SH	Against	Against	Against

JPMorgan Chase & Co.

Meeting Date: 05/20/2025	Country: USA	Ticker: JPM
Record Date: 03/21/2025	Meeting Type: Annual	
Primary Security ID: 46625H100		

Shares Voted: 13,916

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



JPMorgan Chase & Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Mark A. Weinberger	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For
5	Report on Social Impacts of Climate Transition Finance	SH	Against	Against	Against

McDonald's Corporation

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

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

Primary Security ID: 580135101

Shares Voted: 3,556

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony Capuano	Mgmt	For	For	For
1b	Elect Director Kareem Daniel	Mgmt	For	For	For
1c	Elect Director Lloyd Dean	Mgmt	For	For	For
1d	Elect Director Catherine Engelbert	Mgmt	For	For	For
1e	Elect Director Margaret Georgiadis	Mgmt	For	For	For
1f	Elect Director Michael Hsu	Mgmt	For	For	For
1g	Elect Director Christopher Kempczinski	Mgmt	For	For	For
1h	Elect Director Jennifer Taubert	Mgmt	For	For	For
1i	Elect Director Paul Walsh	Mgmt	For	For	For
1j	Elect Director Amy Weaver	Mgmt	For	For	For
1k	Elect Director Miles White	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Risks of Discriminating Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against

## McDonald's Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Disclose an Assessment of Current Climate Transition Plans	SH	Against	Against	Against
6	Consider Eliminating DEI Goals from Compensation Plan Incentives	SH	Against	Against	Against

## Mid-America Apartment Communities, Inc.

**Meeting Date:** 05/20/2025

**Country:** USA

**Ticker:** MAA

**Record Date:** 03/14/2025

**Meeting Type:** Annual

**Primary Security ID:** 59522J103

Shares Voted: 551

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director H. Eric Bolton, Jr.	Mgmt	For	For	For
1b	Elect Director Deborah H. Caplan	Mgmt	For	For	For
1c	Elect Director John P. Case	Mgmt	For	For	For
1d	Elect Director Tamara Fischer	Mgmt	For	For	For
1e	Elect Director Alan B. Graf, Jr.	Mgmt	For	For	For
1f	Elect Director Brad Hill	Mgmt	For	For	For
1g	Elect Director Edith Kelly-Green	Mgmt	For	For	For
1h	Elect Director Sheila K. McGrath	Mgmt	For	For	For
1i	Elect Director Claude B. Nielsen	Mgmt	For	For	For
1j	Elect Director Gary S. Shorb	Mgmt	For	For	For
1k	Elect Director David P. Stockert	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## Principal Financial Group, Inc.

**Meeting Date:** 05/20/2025

**Country:** USA

**Ticker:** PFG

**Record Date:** 03/26/2025

**Meeting Type:** Annual

**Primary Security ID:** 74251V102

Principal Financial Group, Inc.

Shares Voted: 1,092

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Blair C. Pickerell	Mgmt	For	For	For
1.2	Elect Director Clare S. Richer	Mgmt	For	For	For
1.3	Elect Director H. Elizabeth Mitchell	Mgmt	For	For	For
1.4	Elect Director Deanna D. Strable-Soethout	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Targa Resources Corp.

Meeting Date: 05/20/2025Country: USATicker: TRGP  
Record Date: 03/25/2025Meeting Type: Annual  
Primary Security ID: 87612G101

Shares Voted: 1,054

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Waters S. Davis, IV	Mgmt	For	For	For
1.2	Elect Director Rene R. Joyce	Mgmt	For	For	For
1.3	Elect Director Caron A. Lawhorn	Mgmt	For	For	For
1.4	Elect Director Matthew J. Meloy	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Tradeweb Markets Inc.

Meeting Date: 05/20/2025Country: USATicker: TW  
Record Date: 03/24/2025Meeting Type: Annual  
Primary Security ID: 892672106

Tradeweb Markets Inc.

Shares Voted: 554

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Steven Berns	Mgmt	For	For	For
1.2	Elect Director William (Billy) Hult	Mgmt	For	For	For
1.3	Elect Director Lisa Opoku	Mgmt	For	Withhold	Withhold
1.4	Elect Director Rana Yared	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	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: 697

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey Dailey	Mgmt	For	For	For
1b	Elect Director Bruce Hansen	Mgmt	For	For	For
1c	Elect Director Gregory Hendrick	Mgmt	For	For	For
1d	Elect Director Kathleen A. Hogenson	Mgmt	For	For	For
1e	Elect Director Samuel G. Liss	Mgmt	For	For	For
1f	Elect Director Christopher J. Perry	Mgmt	For	For	For
1g	Elect Director Sabra R. Purtill	Mgmt	For	For	For
1h	Elect Director Lee M. Shavel	Mgmt	For	For	For
1i	Elect Director Olumide Soroye	Mgmt	For	For	For
1j	Elect Director Kimberly S. Stevenson	Mgmt	For	For	For
1k	Elect Director Therese M. Vaughan	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Verisk Analytics, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Eliminate Supermajority Vote Requirement for Limitation on Beneficial Ownership of the Company	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement for Certain Business Combinations	Mgmt	For	For	For
6	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
7	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	For	For
8	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

Align Technology, Inc.

Meeting Date: 05/21/2025Country: USATicker: ALGN

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

Primary Security ID: 016255101

Shares Voted: 345					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kevin T. Conroy	Mgmt	For	For	For
1.2	Elect Director Kevin J. Dallas	Mgmt	For	For	For
1.3	Elect Director Joseph M. Hogan	Mgmt	For	For	For
1.4	Elect Director Joseph Lacob	Mgmt	For	For	For
1.5	Elect Director C. Raymond Larkin, Jr.	Mgmt	For	For	For
1.6	Elect Director George J. Morrow	Mgmt	For	For	For
1.7	Elect Director Anne M. Myong	Mgmt	For	For	For
1.8	Elect Director Mojdeh Poul	Mgmt	For	For	For
1.9	Elect Director Andrea L. Saia	Mgmt	For	For	For
1.10	Elect Director Susan E. Siegel	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For

Align Technology, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Amend Omnibus Stock Plan	Mgmt	For	For	For
6	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	Against	Against
7	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	For	For

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: 45,777

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey P. Bezos	Mgmt	For	For	For
1b	Elect Director Andrew R. Jassy	Mgmt	For	For	For
1c	Elect Director Keith B. Alexander	Mgmt	For	For	For
1d	Elect Director Edith W. Cooper	Mgmt	For	For	For
1e	Elect Director Jamie S. Gorelick	Mgmt	For	For	For
1f	Elect Director Daniel P. Huttenlocher	Mgmt	For	For	For
1g	Elect Director Andrew Y. Ng	Mgmt	For	For	For
1h	Elect Director Indra K. Nooyi	Mgmt	For	For	For
1i	Elect Director Jonathan J. Rubinstein	Mgmt	For	For	For
1j	Elect Director Brad D. Smith	Mgmt	For	For	For
1k	Elect Director Patricia Q. Stonesifer	Mgmt	For	For	For
1l	Elect Director Wendell P. Weeks	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Adopt Mandatory Policy Separating the Roles of CEO and Board Chair	SH	Against	Against	Against
5	Report on Risks of Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against

Amazon.com, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Disclose All Material Scope 3 Emissions	SH	Against	Against	Against
7	Report on Impact of Data Centers on Climate Commitments	SH	Against	Against	Against
8	Commission Third Party Assessment of Board Oversight of Human Rights Risks of AI	SH	Against	Against	Against
9	Report on Efforts to Reduce Plastic Packaging	SH	Against	Against	Against
10	Commission Independent Audit and Report on Warehouse Working Conditions	SH	Against	Against	Against
11	Report on Unethical Use of External Data in Development of AI Products	SH	Against	Against	Against

AvalonBay Communities, Inc.

Meeting Date: 05/21/2025

Record Date: 03/21/2025

Primary Security ID: 053484101

Country: USA

Meeting Type: Annual

Ticker: AVB

Shares Voted: 692

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Glyn F. Aeppel	Mgmt	For	For	For
1b	Elect Director Terry S. Brown	Mgmt	For	For	For
1c	Elect Director Ronald L. Havner, Jr.	Mgmt	For	For	For
1d	Elect Director Stephen P. Hills	Mgmt	For	For	For
1e	Elect Director Christopher B. Howard	Mgmt	For	For	For
1f	Elect Director Richard J. Lieb	Mgmt	For	For	For
1g	Elect Director Nnenna Lynch	Mgmt	For	For	For
1h	Elect Director Charles E. Mueller, Jr.	Mgmt	For	For	For
1i	Elect Director Timothy J. Naughton	Mgmt	For	For	For
1j	Elect Director Benjamin W. Schall	Mgmt	For	For	For
1k	Elect Director Susan Swanezy	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

AvalonBay Communities, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

CBRE Group, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: CBRE
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 12504L109		

Shares Voted: 1,488

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Brandon B. Boze	Mgmt	For	For	For
1b	Elect Director Vincent Clancy	Mgmt	For	For	For
1c	Elect Director Beth F. Cobert	Mgmt	For	For	For
1d	Elect Director Reginald H. Gilyard	Mgmt	For	For	For
1e	Elect Director Shira D. Goodman	Mgmt	For	For	For
1f	Elect Director Gerardo I. Lopez	Mgmt	For	For	For
1g	Elect Director Guy A. Metcalfe	Mgmt	For	For	For
1h	Elect Director Gunjan Soni	Mgmt	For	For	For
1i	Elect Director Robert E. Sulentic	Mgmt	For	For	For
1j	Elect Director Sanjiv Yajnik	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Crown Castle Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: CCI
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 22822V101		

Shares Voted: 2,129

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director P. Robert Bartolo	Mgmt	For	For	For
1b	Elect Director Jason Genrich	Mgmt	For	For	For



Crown Castle Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Andrea J. Goldsmith	Mgmt	For	For	For
1d	Elect Director Tammy K. Jones	Mgmt	For	For	For
1e	Elect Director Kevin T. Kabat	Mgmt	For	For	For
1f	Elect Director Anthony J. Melone	Mgmt	For	For	For
1g	Elect Director Katherine Motlagh	Mgmt	For	For	For
1h	Elect Director Kevin A. Stephens	Mgmt	For	For	For
1i	Elect Director Matthew Thornton, III	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirements	Mgmt	For	For	For
5	Amend Charter to Eliminate Unnecessary and Outdated Provisions	Mgmt	For	For	For

Diamondback Energy, Inc.

Meeting Date: 05/21/2025

Record Date: 04/01/2025

Primary Security ID: 25278X109

Country: USA

Meeting Type: Annual

Ticker: FANG

Shares Voted: 911

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Vincent "Vince" K. Brooks	Mgmt	For	For	For
1.2	Elect Director Darin G. Holderness	Mgmt	For	For	For
1.3	Elect Director Rebecca A. Klein	Mgmt	For	For	For
1.4	Elect Director Stephanie K. Mains	Mgmt	For	For	For
1.5	Elect Director Charles A. Meloy	Mgmt	For	For	For
1.6	Elect Director Mark L. Plaumann	Mgmt	For	For	For
1.7	Elect Director Robert K. Reeves	Mgmt	For	For	For
1.8	Elect Director Lance W. Robertson	Mgmt	For	For	For

Diamondback Energy, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.9	Elect Director Travis D. Stice	Mgmt	For	For	For
1.10	Elect Director Melanie M. Trent	Mgmt	For	For	For
1.11	Elect Director Frank D. Tsuru	Mgmt	For	For	For
1.12	Elect Director Kaes Van't Hof	Mgmt	For	For	For
1.13	Elect Director Steven E. West	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

EOG Resources, Inc.

Meeting Date: 05/21/2025

Record Date: 03/24/2025

Primary Security ID: 26875P101

Country: USA

Meeting Type: Annual

Ticker: EOG

Shares Voted: 2,786

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Janet F. Clark	Mgmt	For	For	For
1b	Elect Director Charles R. Crisp	Mgmt	For	For	For
1c	Elect Director Robert P. Daniels	Mgmt	For	For	For
1d	Elect Director Lynn A. Dugle	Mgmt	For	For	For
1e	Elect Director C. Christopher Gaut	Mgmt	For	For	For
1f	Elect Director Michael T. Kerr	Mgmt	For	For	For
1g	Elect Director Julie J. Robertson	Mgmt	For	For	For
1h	Elect Director Ezra Y. Yacob	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Equinix, Inc.

Meeting Date: 05/21/2025

Record Date: 03/25/2025

Primary Security ID: 29444U700

Country: USA

Meeting Type: Annual

Ticker: EQIX

Shares Voted: 466

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nanci Caldwell	Mgmt	For	For	For
1b	Elect Director Adaire Fox-Martin	Mgmt	For	For	For
1c	Elect Director Gary Hromadko	Mgmt	For	For	For
1d	Elect Director Charles Meyers	Mgmt	For	For	For
1e	Elect Director Thomas Olinger	Mgmt	For	For	For
1f	Elect Director Christopher Paisley	Mgmt	For	For	For
1g	Elect Director Sandra Rivera	Mgmt	For	For	For
1h	Elect Director Fidelma Russo	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent to 10%	SH	Against	For	For

Meeting Date: 05/21/2025Country: USATicker: EXR

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

Primary Security ID: 30225T102

Shares Voted: 1,039

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kenneth M. Woolley	Mgmt	For	For	For
1.2	Elect Director Joseph D. Margolis	Mgmt	For	For	For
1.3	Elect Director Mark G. Barberio	Mgmt	For	For	For
1.4	Elect Director Joseph J. Bonner	Mgmt	For	For	For
1.5	Elect Director Gary L. Crittenden	Mgmt	For	For	For
1.6	Elect Director Susan Harnett	Mgmt	For	For	For
1.7	Elect Director Spencer F. Kirk	Mgmt	For	For	For

Extra Space Storage Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Diane Olmstead	Mgmt	For	For	For
1.9	Elect Director Joseph V. Saffire	Mgmt	For	For	For
1.10	Elect Director Julia Vander Ploeg	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

FirstEnergy Corp.

Meeting Date: 05/21/2025

Record Date: 03/25/2025

Primary Security ID: 337932107

Country: USA

Meeting Type: Annual

Ticker: FE

Shares Voted: 2,703

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Heidi L. Boyd	Mgmt	For	For	For
1.2	Elect Director Jana T. Croom	Mgmt	For	For	For
1.3	Elect Director Steven J. Demetriou	Mgmt	For	For	For
1.4	Elect Director Lisa Winston Hicks	Mgmt	For	For	For
1.5	Elect Director Paul Kaleta	Mgmt	For	Against	Against
1.6	Elect Director James F. O'Neil, III	Mgmt	For	For	For
1.7	Elect Director John W. Somerhalder, II	Mgmt	For	For	For
1.8	Elect Director Brian X. Tierney	Mgmt	For	For	For
1.9	Elect Director Leslie M. Turner	Mgmt	For	For	For
1.10	Elect Director Melvin D. Williams	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	Against	Against

# Halliburton Company

**Meeting Date:** 05/21/2025

**Country:** USA

**Ticker:** HAL

**Record Date:** 03/24/2025

**Meeting Type:** Annual

**Primary Security ID:** 406216101

Shares Voted: 4,309

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Abdulaziz F. Al Khayyal	Mgmt	For	For	For
1b	Elect Director William E. Albrecht	Mgmt	For	For	For
1c	Elect Director M. Katherine Banks	Mgmt	For	For	For
1d	Elect Director Alan M. Bennett	Mgmt	For	For	For
1e	Elect Director Earl M. Cummings	Mgmt	For	For	For
1f	Elect Director Murry S. Gerber	Mgmt	For	For	For
1g	Elect Director Robert A. Malone	Mgmt	For	For	For
1h	Elect Director Jeffrey A. Miller	Mgmt	For	For	For
1i	Elect Director Maurice S. Smith	Mgmt	For	For	For
1j	Elect Director Janet L. Weiss	Mgmt	For	For	For
1k	Elect Director Tobi M. Edwards Young	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

# Illumina, Inc.

**Meeting Date:** 05/21/2025

**Country:** USA

**Ticker:** ILMN

**Record Date:** 03/26/2025

**Meeting Type:** Annual

**Primary Security ID:** 452327109

Shares Voted: 754

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Frances Arnold	Mgmt	For	For	For
1B	Elect Director Caroline D. Dorsa	Mgmt	For	For	For
1C	Elect Director Robert S. Epstein	Mgmt	For	For	For
1D	Elect Director Scott Gottlieb	Mgmt	For	For	For
1E	Elect Director Gary S. Guthart	Mgmt	For	For	For
1F	Elect Director Keith A. Meister	Mgmt	For	For	For

Illumina, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1G	Elect Director Anna Richo	Mgmt	For	For	For
1H	Elect Director Philip W. Schiller	Mgmt	For	For	For
1I	Elect Director Susan E. Siegel	Mgmt	For	For	For
1J	Elect Director Jacob Thaysen	Mgmt	For	For	For
1K	Elect Director Scott B. Ullem	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Markel Group Inc.

Meeting Date: 05/21/2025

Country: USA

Ticker: MKL

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 570535104

Shares Voted: 61					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark M. Besca	Mgmt	For	For	For
1b	Elect Director Lawrence A. Cunningham	Mgmt	For	For	For
1c	Elect Director Thomas S. Gayner	Mgmt	For	For	For
1d	Elect Director Greta J. Harris	Mgmt	For	For	For
1e	Elect Director Morgan E. Housel	Mgmt	For	For	For
1f	Elect Director Diane Leopold	Mgmt	For	For	For
1g	Elect Director Steven A. Markel	Mgmt	For	For	For
1h	Elect Director Jonathan E. Michael	Mgmt	For	For	For
1i	Elect Director Harold L. Morrison, Jr.	Mgmt	For	For	For
1j	Elect Director Michael O'Reilly	Mgmt	For	For	For
1k	Elect Director A. Lynne Puckett	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Markel Group Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Disclose GHG Emissions from Underwriting, Insuring, and Investing	SH	Against	Against	Against
5	Adopt Simple Majority Vote	SH	Against	For	For

Mondelez International, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: MDLZ
Record Date: 03/12/2025	Meeting Type: Annual	
Primary Security ID: 609207105		

Shares Voted: 6,527					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ertharin Cousin	Mgmt	For	For	For
1.2	Elect Director Cees 't Hart	Mgmt	For	For	For
1.3	Elect Director Nancy McKinstry	Mgmt	For	For	For
1.4	Elect Director Brian J. McNamara	Mgmt	For	For	For
1.5	Elect Director Jorge S. Mesquita	Mgmt	For	For	For
1.6	Elect Director Jane Hamilton Nielsen	Mgmt	For	For	For
1.7	Elect Director Paula A. Price	Mgmt	For	For	For
1.8	Elect Director Patrick T. Siewert	Mgmt	For	For	For
1.9	Elect Director Michael A. Todman	Mgmt	For	For	For
1.10	Elect Director Dirk Van de Put	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Commission Third Party Assessment of Company's Commitment to Freedom of Association and Collective Bargaining	SH	Against	Against	Against
6	Report on Sustainable Packaging Policies for Flexible Plastics	SH	Against	Against	Against
7	Report on Climate Lobbying	SH	Against	Against	Against

Mondelez International, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
8	Commission Third-Party Report on Effectiveness of Implementing Human Rights Policy in High Risk Areas	SH	Against	Against	Against
9	Report on Recycled Content Claims of Plastic Packaging	SH	Against	Against	Against

Northrop Grumman Corporation

Meeting Date: 05/21/2025

Country: USA

Ticker: NOC

Record Date: 03/25/2025

Meeting Type: Annual

Primary Security ID: 666807102

Shares Voted: 702

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kathy J. Warden	Mgmt	For	For	For
1b	Elect Director David P. Abney	Mgmt	For	For	For
1c	Elect Director Marianne C. Brown	Mgmt	For	For	For
1d	Elect Director Ann M. Fudge	Mgmt	For	For	For
1e	Elect Director Madeleine A. Kleiner	Mgmt	For	For	For
1f	Elect Director Arvind Krishna	Mgmt	For	For	For
1g	Elect Director Kimberly A. Ross	Mgmt	For	For	For
1h	Elect Director Gary Roughead	Mgmt	For	For	For
1i	Elect Director Thomas M. Schoewe	Mgmt	For	For	For
1j	Elect Director James S. Turley	Mgmt	For	For	For
1k	Elect Director Mark A. Welsh, III	Mgmt	For	For	For
1l	Elect Director Mary A. Winston	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Clawback Policy	SH	Against	Against	Against

Old Dominion Freight Line, Inc.

Meeting Date: 05/21/2025

Country: USA

Ticker: ODFL

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 679580100



Old Dominion Freight Line, Inc.

Shares Voted: 902

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Sherry A. Aaholm	Mgmt	For	For	For
1.2	Elect Director David S. Congdon	Mgmt	For	For	For
1.3	Elect Director John R. Congdon, Jr.	Mgmt	For	For	For
1.4	Elect Director Andrew S. Davis	Mgmt	For	For	For
1.5	Elect Director Kevin M. Freeman	Mgmt	For	For	For
1.6	Elect Director Bradley R. Gabosch	Mgmt	For	For	For
1.7	Elect Director Greg C. Gantt	Mgmt	For	For	For
1.8	Elect Director John D. Kasarda	Mgmt	For	For	For
1.9	Elect Director Debra S. King	Mgmt	For	For	For
1.10	Elect Director Cheryl S. Miller	Mgmt	For	For	For
1.11	Elect Director Wendy T. Stallings	Mgmt	For	For	For
1.12	Elect Director Thomas A. Stith, III	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Disclose Plans to Reduce Scope 1 and 2 GHG Emissions Aligned with Paris Agreement Goals	SH	Against	Against	Against

ONEOK, Inc.

Meeting Date: 05/21/2025Country: USATicker: OKE

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

Primary Security ID: 682680103

Shares Voted: 2,865

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Brian L. Derksen	Mgmt	For	For	For
1.2	Elect Director Julie H. Edwards	Mgmt	For	For	For
1.3	Elect Director Lori A. Gobillot	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Mark W. Helderman	Mgmt	For	For	For
1.5	Elect Director Randall J. Larson	Mgmt	For	For	For
1.6	Elect Director Pattye L. Moore	Mgmt	For	For	For
1.7	Elect Director Pierce H. Norton, II	Mgmt	For	For	For
1.8	Elect Director Eduardo A. Rodriguez	Mgmt	For	For	For
1.9	Elect Director Gerald D. Smith	Mgmt	For	For	For
1.10	Elect Director Wayne T. Smith	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Approve Restricted Stock Plan	Mgmt	For	For	For
5	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Phillips 66

Meeting Date: 05/21/2025Country: USATicker: PSX

Record Date: 04/04/2025Meeting Type: Proxy Contest

Primary Security ID: 718546104

Shares Voted: 2,115

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Management Universal Proxy (White Proxy Card)	Mgmt			
	From the Combined List of Management & Dissident Nominees - Elect 4 Directors	Mgmt			
1a	Elect Management Nominee Director A. Nigel Hearne	Mgmt	For	Do Not Vote	Do Not Vote
1b	Elect Management Nominee Director John E. Lowe	Mgmt	For	Do Not Vote	Do Not Vote
1c	Elect Management Nominee Director Robert W. Pease	Mgmt	For	Do Not Vote	Do Not Vote
1d	Elect Management Nominee Director Howard I. Ungerleider	Mgmt	For	Do Not Vote	Do Not Vote
1e	Elect Dissident Nominee Director Brian S. Coffman	SH	Withhold	Do Not Vote	Do Not Vote
1f	Elect Dissident Nominee Director Sigmund L. Cornelius	SH	Withhold	Do Not Vote	Do Not Vote

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Dissident Nominee Director Michael A. Heim	SH	Withhold	Do Not Vote	Do Not Vote
1h	Elect Dissident Nominee Director Stacy D. Nieuwoudt	SH	Withhold	Do Not Vote	Do Not Vote
2	Declassify the Board of Directors	Mgmt	For	Do Not Vote	Do Not Vote
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Do Not Vote	Do Not Vote
4	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	Do Not Vote	Do Not Vote
5	Ratify Ernst & Young LLP as Auditors	Mgmt	For	Do Not Vote	Do Not Vote
6	Adopt Policy Requiring Annual Director Resignations	SH	Against	Do Not Vote	Do Not Vote
	Dissident Universal Proxy (Gold Proxy Card)	Mgmt			
	From the Combined List of Management & Dissident Nominees - Elect 4 Directors	Mgmt			
	ELLIOTT NOMINEES	Mgmt			
1a	Elect Dissident Nominee Director Brian S. Coffman	SH	For	For	For
1b	Elect Dissident Nominee Director Sigmund L. Cornelius	SH	For	For	For
1c	Elect Dissident Nominee Director Michael A. Heim	SH	For	For	For
1d	Elect Dissident Nominee Director Stacy D. Nieuwoudt	SH	For	For	For
	COMPANY NOMINEES OPPOSED BY ELLIOTT	Mgmt			
1a	Elect Management Nominee Director A. Nigel Hearne	Mgmt	Withhold	Withhold	Withhold
1b	Elect Management Nominee Director John E. Lowe	Mgmt	Withhold	Withhold	Withhold
1c	Elect Management Nominee Director Robert W. Pease	Mgmt	Withhold	Withhold	Withhold
1d	Elect Management Nominee Director Howard I. Ungerleider	Mgmt	Withhold	Withhold	Withhold
2	Declassify the Board of Directors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	None	For	For
4	Advisory Vote on Say on Pay Frequency	Mgmt	None	One Year	One Year
5	Ratify Ernst & Young LLP as Auditors	Mgmt	None	For	For

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Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Adopt Policy Requiring Annual Director Resignations	SH	For	Against	Against

Reliance, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: RS
Record Date: 03/28/2025	Meeting Type: Annual	
Primary Security ID: 759509102		

Shares Voted: 253					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lisa L. Baldwin	Mgmt	For	For	For
1b	Elect Director Karen W. Colonias	Mgmt	For	For	For
1c	Elect Director Frank J. Dellaquila	Mgmt	For	For	For
1d	Elect Director James K. Kamsickas	Mgmt	For	For	For
1e	Elect Director Karla R. Lewis	Mgmt	For	For	For
1f	Elect Director Robert A. McEvoy	Mgmt	For	For	For
1g	Elect Director David W. Seeger	Mgmt	For	For	For
1h	Elect Director Douglas W. Stotlar	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Ross Stores, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: ROST
Record Date: 03/25/2025	Meeting Type: Annual	
Primary Security ID: 778296103		

Shares Voted: 1,565					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael Balmuth	Mgmt	For	For	For
1b	Elect Director K. Gunnar Bjorklund	Mgmt	For	For	For
1c	Elect Director Michael J. Bush	Mgmt	For	For	For

Ross Stores, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Edward G. Cannizzaro	Mgmt	For	For	For
1e	Elect Director James G. Conroy	Mgmt	For	For	For
1f	Elect Director Sharon D. Garrett	Mgmt	For	For	For
1g	Elect Director Michael J. Hartshorn	Mgmt	For	For	For
1h	Elect Director Stephen D. Milligan	Mgmt	For	For	For
1i	Elect Director Patricia H. Mueller	Mgmt	For	For	For
1j	Elect Director George P. Orban	Mgmt	For	For	For
1k	Elect Director Doniel N. Sutton	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

SS&C Technologies Holdings, Inc.

Meeting Date: 05/21/2025Country: USATicker: SSNC

Record Date: 03/25/2025Meeting Type: Annual

Primary Security ID: 78467J100

Shares Voted: 1,029

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Smita Conjeevaram	Mgmt	For	For	For
1b	Elect Director William C. Stone	Mgmt	For	For	For
1c	Elect Director Francesco Vanni d'Archirafi	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

The Hartford Insurance Group, Inc.

Meeting Date: 05/21/2025Country: USATicker: HIG

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

Primary Security ID: 416515104

The Hartford Insurance Group, Inc.

Shares Voted: 1,434

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Larry D. De Shon	Mgmt	For	For	For
1b	Elect Director Carlos Dominguez	Mgmt	For	For	For
1c	Elect Director Trevor Fetter	Mgmt	For	For	For
1d	Elect Director Donna A. James	Mgmt	For	For	For
1e	Elect Director Annette Rippert	Mgmt	For	For	For
1f	Elect Director Teresa Wynn Roseborough	Mgmt	For	For	For
1g	Elect Director Virginia P. Ruesterholz	Mgmt	For	For	For
1h	Elect Director Christopher J. Swift	Mgmt	For	For	For
1i	Elect Director Matthew E. Winter	Mgmt	For	For	For
1j	Elect Director Kathleen Winters	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

The Southern Company

Meeting Date: 05/21/2025Country: USATicker: SO

Record Date: 03/31/2025Meeting Type: Annual

Primary Security ID: 842587107

Shares Voted: 5,367

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

## The Southern Company

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

## The Travelers Companies, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: TRV
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 89417E109		

Shares Voted: 1,121

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Russell G. Golden	Mgmt	For	For	For
1b	Elect Director Thomas B. Leonardi	Mgmt	For	For	For
1c	Elect Director Clarence Otis, Jr.	Mgmt	For	For	For
1d	Elect Director Elizabeth E. Robinson	Mgmt	For	For	For
1e	Elect Director Rafael Santana	Mgmt	For	For	For

The Travelers Companies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Todd C. Schermerhorn	Mgmt	For	For	For
1g	Elect Director Alan D. Schnitzer	Mgmt	For	For	For
1h	Elect Director Laurie J. Thomsen	Mgmt	For	For	For
1i	Elect Director Bridget van Kralingen	Mgmt	For	For	For
1j	Elect Director David S. Williams	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Climate-Related Pricing and Coverage Decisions	SH	Against	Against	Against
6	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Thermo Fisher Scientific Inc.

Meeting Date: 05/21/2025

Record Date: 03/24/2025

Primary Security ID: 883556102

Country: USA

Meeting Type: Annual

Ticker: TMO

Shares Voted: 1,894

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marc N. Casper	Mgmt	For	For	For
1b	Elect Director Nelson J. Chai	Mgmt	For	For	For
1c	Elect Director Ruby R. Chandy	Mgmt	For	For	For
1d	Elect Director C. Martin Harris	Mgmt	For	For	For
1e	Elect Director Tyler Jacks	Mgmt	For	For	For
1f	Elect Director Jennifer M. Johnson	Mgmt	For	For	For
1g	Elect Director R. Alexandra Keith	Mgmt	For	For	For
1h	Elect Director Karen S. Lynch	Mgmt	For	For	For
1i	Elect Director James C. Mullen	Mgmt	For	For	For
1j	Elect Director Debora L. Spar	Mgmt	For	For	For
1k	Elect Director Scott M. Sperling	Mgmt	For	For	For
1l	Elect Director Dion J. Weisler	Mgmt	For	For	For



Thermo Fisher Scientific Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

United Airlines Holdings, Inc.

Meeting Date: 05/21/2025	Country: USA	Ticker: UAL
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 910047109		

Shares Voted: 1,601

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rosalind Brewer	Mgmt	For	For	For
1b	Elect Director Michelle Freyre	Mgmt	For	For	For
1c	Elect Director Matthew Friend	Mgmt	For	For	For
1d	Elect Director Barney Harford	Mgmt	For	For	For
1e	Elect Director Michele J. Hooper	Mgmt	For	For	For
1f	Elect Director Walter Isaacson	Mgmt	For	For	For
1g	Elect Director J. Scott Kirby	Mgmt	For	For	For
1h	Elect Director Edward M. Philip	Mgmt	For	For	For
1i	Elect Director Edward L. Shapiro	Mgmt	For	For	For
1j	Elect Director Laysha Ward	Mgmt	For	For	For
1k	Elect Director James M. Whitehurst	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	Against	Against

Xcel Energy Inc.

Meeting Date: 05/21/2025

Record Date: 03/24/2025

Primary Security ID: 98389B100

Country: USA

Meeting Type: Annual

Ticker: XEL

Shares Voted: 2,842

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Megan Burkhart	Mgmt	For	For	For
1b	Elect Director Lynn Casey	Mgmt	For	For	For
1c	Elect Director Bob Frenzel	Mgmt	For	For	For
1d	Elect Director Netha Johnson	Mgmt	For	For	For
1e	Elect Director Patricia Kampling	Mgmt	For	For	For
1f	Elect Director George Kehl	Mgmt	For	For	For
1g	Elect Director Richard O'Brien	Mgmt	For	For	For
1h	Elect Director Charles Pardee	Mgmt	For	For	For
1i	Elect Director James Prokopanko	Mgmt	For	For	For
1j	Elect Director Devin Stockfish	Mgmt	For	For	For
1k	Elect Director Timothy Welsh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Zoetis Inc.

Meeting Date: 05/21/2025

Record Date: 03/28/2025

Primary Security ID: 98978V103

Country: USA

Meeting Type: Annual

Ticker: ZTS

Shares Voted: 2,194

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Paul M. Bisaro	Mgmt	For	For	For
1b	Elect Director Vanessa Broadhurst	Mgmt	For	For	For
1c	Elect Director Frank A. D'Amelio	Mgmt	For	For	For
1d	Elect Director Gavin D.K. Hattersley	Mgmt	For	For	For
1e	Elect Director Sanjay Khosla	Mgmt	For	For	For
1f	Elect Director Antoinette R. Leatherberry	Mgmt	For	For	For

Zoetis Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Michael B. McCallister	Mgmt	For	For	For
1h	Elect Director Gregory Norden	Mgmt	For	For	For
1i	Elect Director Louise M. Parent	Mgmt	For	For	For
1j	Elect Director Kristin C. Peck	Mgmt	For	For	For
1k	Elect Director Willie M. Reed	Mgmt	For	For	For
1l	Elect Director Mark Stetter	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

DuPont de Nemours, Inc.

Meeting Date: 05/22/2025

Country: USA

Ticker: DD

Record Date: 03/31/2025

Meeting Type: Annual

Primary Security ID: 26614N102

Shares Voted: 1,837

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Amy G. Brady	Mgmt	For	For	For
1b	Elect Director Edward D. Breen	Mgmt	For	For	For
1c	Elect Director Ruby R. Chandy	Mgmt	For	For	For
1d	Elect Director Terrence R. Curtin	Mgmt	For	For	For
1e	Elect Director Alexander M. Cutler	Mgmt	For	For	For
1f	Elect Director Eleuthere I. du Pont	Mgmt	For	For	For
1g	Elect Director Kristina M. Johnson	Mgmt	For	For	For
1h	Elect Director Luther C. Kissam, IV	Mgmt	For	For	For
1i	Elect Director Lori D. Koch	Mgmt	For	For	For
1j	Elect Director James A. Lico	Mgmt	For	For	For
1k	Elect Director Frederick M. Lowery	Mgmt	For	For	For
1l	Elect Director Kurt B. McMaken	Mgmt	For	For	For
1m	Elect Director Steven M. Sterin	Mgmt	For	For	For

DuPont de Nemours, Inc.

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

Insulet Corporation

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

Record Date: 03/26/2025Meeting Type: Annual

Primary Security ID: 45784P101

Shares Voted: 339					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jessica Hopfield	Mgmt	For	For	For
1.2	Elect Director Ashley A. McEvoy	Mgmt	For	For	For
1.3	Elect Director Elizabeth H. Weatherman	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For	For

Kenvue Inc.

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

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

Primary Security ID: 49177J102

Shares Voted: 9,448					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard E. Allison, Jr.	Mgmt	For	For	For
1b	Elect Director Seemantini Godbole	Mgmt	For	For	For
1c	Elect Director Melanie L. Healey	Mgmt	For	For	For
1d	Elect Director Sarah Hofstetter	Mgmt	For	For	For
1e	Elect Director Betsy D. Holden	Mgmt	For	For	For

Kenvue Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Erica L. Mann	Mgmt	For	For	For
1g	Elect Director Larry J. Merlo	Mgmt	For	For	For
1h	Elect Director Thibaut Mongon	Mgmt	For	For	For
1i	Elect Director Kathleen M. Pawlus	Mgmt	For	For	For
1j	Elect Director Kirk L. Perry	Mgmt	For	For	For
1k	Elect Director Vasant Prabhu	Mgmt	For	For	For
1l	Elect Director Jeffrey C. Smith	Mgmt	For	For	For
1m	Elect Director Michael E. Sneed	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Lennox International Inc.

Meeting Date: 05/22/2025

Record Date: 03/28/2025

Primary Security ID: 526107107

Country: USA

Meeting Type: Annual

Ticker: LII

Shares Voted: 147

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alok Maskara	Mgmt	For	For	For
1.2	Elect Director Sivasankaran ("Soma") Somasundaram	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

LPL Financial Holdings Inc.

Meeting Date: 05/22/2025

Record Date: 03/24/2025

Primary Security ID: 50212V100

Country: USA

Meeting Type: Annual

Ticker: LPLA

LPL Financial Holdings Inc.

Shares Voted: 364

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard Steinmeier	Mgmt	For	For	For
1b	Elect Director Edward C. Bernard	Mgmt	For	For	For
1c	Elect Director H. Paulett Eberhart	Mgmt	For	For	For
1d	Elect Director William F. Glavin, Jr.	Mgmt	For	For	For
1e	Elect Director Albert J. Ko	Mgmt	For	For	For
1f	Elect Director Allison H. Mnookin	Mgmt	For	For	For
1g	Elect Director Anne M. Mulcahy	Mgmt	For	For	For
1h	Elect Director James S. Putnam	Mgmt	For	For	For
1i	Elect Director Richard P. Schifter	Mgmt	For	For	For
1j	Elect Director Corey E. Thomas	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

NextEra Energy, Inc.

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

Record Date: 03/25/2025Meeting Type: Annual

Primary Security ID: 65339F101

Shares Voted: 9,976

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicole S. Arnaboldi	Mgmt	For	For	For
1b	Elect Director James L. Camaren	Mgmt	For	For	For
1c	Elect Director Naren K. Gursahaney	Mgmt	For	For	For
1d	Elect Director Kirk S. Hachigian	Mgmt	For	For	For
1e	Elect Director Maria G. Henry	Mgmt	For	For	For
1f	Elect Director John W. Ketchum	Mgmt	For	For	For
1g	Elect Director Amy B. Lane	Mgmt	For	For	For

NextEra Energy, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Geoffrey S. Martha	Mgmt	For	For	For
1i	Elect Director David L. Porges	Mgmt	For	For	For
1j	Elect Director Deborah L. "Dev" Stahlkopf	Mgmt	For	For	For
1k	Elect Director John A. Stall	Mgmt	For	For	For
1l	Elect Director Darryl L. Wilson	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

PG&E Corporation

Meeting Date: 05/22/2025

Record Date: 03/24/2025

Primary Security ID: 69331C108

Country: USA

Meeting Type: Annual

Ticker: PCG

Shares Voted: 10,850

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rajat Bahri	Mgmt	For	For	For
1b	Elect Director Cheryl F. Campbell	Mgmt	For	For	For
1c	Elect Director Edward G. Cannizzaro	Mgmt	For	For	For
1d	Elect Director Kerry W. Cooper	Mgmt	For	For	For
1e	Elect Director Leo P. Denault	Mgmt	For	For	For
1f	Elect Director Jessica L. Denecour	Mgmt	For	For	For
1g	Elect Director Mark E. Ferguson, III	Mgmt	For	For	For
1h	Elect Director W. Craig Fugate	Mgmt	For	For	For
1i	Elect Director Arno L. Harris	Mgmt	For	For	For
1j	Elect Director Carlos M. Hernandez	Mgmt	For	For	For
1k	Elect Director John O. Larsen	Mgmt	For	For	For
1l	Elect Director Patricia K. Poppe	Mgmt	For	For	For
1m	Elect Director William L. Smith	Mgmt	For	For	For
1n	Elect Director Benjamin F. Wilson	Mgmt	For	For	For

PG&E Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte and Touche LLP as Auditors	Mgmt	For	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

Pinterest, Inc.

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

Record Date: 03/26/2025Meeting Type: Annual

Primary Security ID: 72352L106

Shares Voted: 2,884

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Leslie Kilgore	Mgmt	For	For	For
1b	Elect Director Bill Ready	Mgmt	For	For	For
1c	Elect Director Benjamin W. Silbermann	Mgmt	For	For	For
1d	Elect Director Salaam Coleman Smith	Mgmt	For	Against	Against
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	Against	Against

Quanta Services, Inc.

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

Record Date: 04/02/2025Meeting Type: Annual

Primary Security ID: 74762E102

Shares Voted: 706

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Earl C. (Duke) Austin, Jr.	Mgmt	For	For	For
1.2	Elect Director Warner L. Baxter	Mgmt	For	For	For
1.3	Elect Director Doyle N. Beneby	Mgmt	For	For	For



Quanta Services, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Bernard Fried	Mgmt	For	For	For
1.5	Elect Director Worthing F. Jackman	Mgmt	For	For	For
1.6	Elect Director Holli C. Ladhani	Mgmt	For	For	For
1.7	Elect Director Jo-ann M. dePass Olsovsky	Mgmt	For	For	For
1.8	Elect Director R. Scott Rowe	Mgmt	For	For	For
1.9	Elect Director Raul J. Valentin	Mgmt	For	For	For
1.10	Elect Director Martha B. Wyrsh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

ServiceNow, Inc.

Meeting Date: 05/22/2025

Country: USA

Ticker: NOW

Record Date: 03/24/2025

Meeting Type: Annual

Primary Security ID: 81762P102

Shares Voted: 1,010

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan L. Bostrom	Mgmt	For	For	For
1b	Elect Director Teresa Briggs	Mgmt	For	For	For
1c	Elect Director Jonathan C. Chadwick	Mgmt	For	For	For
1d	Elect Director Paul E. Chamberlain	Mgmt	For	For	For
1e	Elect Director Lawrence J. Jackson, Jr.	Mgmt	For	For	For
1f	Elect Director Frederic B. Luddy	Mgmt	For	For	For
1g	Elect Director William R. McDermott	Mgmt	For	For	For
1h	Elect Director Joseph "Larry" Quinlan	Mgmt	For	For	For
1i	Elect Director Anita M. Sands	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

ServiceNow, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Reflect Delaware Law Provisions Regarding Officer Exculpation	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirements	Mgmt	For	For	For
6	Amend Bylaws Regarding Right to Cure Purported Nomination Defects	SH	Against	Against	Against
7	Amend Right to Call Special Meeting	SH	Against	Against	Against

The Charles Schwab Corporation

Meeting Date: 05/22/2025

Country: USA

Ticker: SCHW

Record Date: 03/24/2025

Meeting Type: Annual

Primary Security ID: 808513105

Shares Voted: 7,395

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John K. Adams, Jr.	Mgmt	For	For	For
1.2	Elect Director Stephen A. Ellis	Mgmt	For	For	For
1.3	Elect Director Arun Sarin	Mgmt	For	For	For
1.4	Elect Director Charles R. Schwab	Mgmt	For	For	For
1.5	Elect Director Paula A. Sneed	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Declassify the Board of Directors	SH	Against	For	For

The Home Depot, Inc.

Meeting Date: 05/22/2025

Country: USA

Ticker: HD

Record Date: 03/24/2025

Meeting Type: Annual

Primary Security ID: 437076102

The Home Depot, Inc.

Shares Voted: 4,934

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gerard J. Arpey	Mgmt	For	For	For
1b	Elect Director Ari Bousbib	Mgmt	For	For	For
1c	Elect Director Jeffery H. Boyd	Mgmt	For	For	For
1d	Elect Director Gregory D. Brenneman	Mgmt	For	For	For
1e	Elect Director J. Frank Brown	Mgmt	For	For	For
1f	Elect Director Edward P. Decker	Mgmt	For	For	For
1g	Elect Director Wayne M. Hewett	Mgmt	For	For	For
1h	Elect Director Manuel Kadre	Mgmt	For	For	For
1i	Elect Director Stephanie C. Linnartz	Mgmt	For	For	For
1j	Elect Director Paula A. Santilli	Mgmt	For	For	For
1k	Elect Director Caryn Seidman-Becker	Mgmt	For	For	For
1l	Elect Director Asha Sharma	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against
5	Disclose a Biodiversity Impact and Dependency Assessment	SH	Against	Against	Against
6	Report on Efforts to Reduce Plastic Use	SH	Against	Against	Against

VeriSign, Inc.

Meeting Date: 05/22/2025

Record Date: 04/01/2025

Primary Security ID: 92343E102

Country: USA

Meeting Type: Annual

Ticker: VRSN

Shares Voted: 394

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director D. James Bidzos	Mgmt	For	For	For
1.2	Elect Director Courtney D. Armstrong	Mgmt	For	For	For

VeriSign, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director Yehuda Ari Buchalter	Mgmt	For	For	For
1.4	Elect Director Kathleen A. Cote	Mgmt	For	For	For
1.5	Elect Director Thomas F. Frist, III	Mgmt	For	For	For
1.6	Elect Director Jamie S. Gorelick	Mgmt	For	For	For
1.7	Elect Director Debra W. McCann	Mgmt	For	For	For
1.8	Elect Director Timothy Tomlinson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
5	Provide Right to Act by Written Consent	SH	Against	Against	Against

Verizon Communications Inc.

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

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

Primary Security ID: 92343V104

Shares Voted: 20,880

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Shellye Archambeau	Mgmt	For	For	For
1.2	Elect Director Roxanne Austin	Mgmt	For	For	For
1.3	Elect Director Mark Bertolini	Mgmt	For	For	For
1.4	Elect Director Vittorio Colao	Mgmt	For	For	For
1.5	Elect Director Caroline Litchfield	Mgmt	For	For	For
1.6	Elect Director Laxman Narasimhan	Mgmt	For	For	For
1.7	Elect Director Clarence Otis, Jr.	Mgmt	For	For	For
1.8	Elect Director Daniel Schulman	Mgmt	For	For	For
1.9	Elect Director Carol Tome	Mgmt	For	For	For
1.10	Elect Director Hans Vestberg	Mgmt	For	For	For

Verizon Communications Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Climate Lobbying	SH	Against	Against	Against
5	Report on Potential Hazards of Lead Cables and Potential Remediation Costs	SH	Against	Against	Against
6	Report on Risks Related to Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	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: 274					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Flemming Ornskov	Mgmt	For	For	For
1.2	Elect Director Linda Baddour	Mgmt	For	For	For
1.3	Elect Director Udit Batra	Mgmt	For	For	For
1.4	Elect Director Dan Brennan	Mgmt	For	For	For
1.5	Elect Director Richard Fearon	Mgmt	For	For	For
1.6	Elect Director Pearl S. Huang	Mgmt	For	For	For
1.7	Elect Director Wei Jiang	Mgmt	For	For	For
1.8	Elect Director Heather Knight	Mgmt	For	For	For
1.9	Elect Director Christopher A. Kuebler	Mgmt	For	For	For
1.10	Elect Director Mark Vergnano	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

Welltower Inc.

Meeting Date: 05/22/2025

Record Date: 03/27/2025

Primary Security ID: 95040Q104

Country: USA

Meeting Type: Annual

Ticker: WELL

Shares Voted: 3,020

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kenneth J. Bacon	Mgmt	For	For	For
1b	Elect Director Karen B. DeSalvo	Mgmt	For	For	For
1c	Elect Director Andrew Gundlach	Mgmt	For	For	For
1d	Elect Director Dennis G. Lopez	Mgmt	For	For	For
1e	Elect Director Shankh Mitra	Mgmt	For	For	For
1f	Elect Director Ade J. Patton	Mgmt	For	For	For
1g	Elect Director Sergio D. Rivera	Mgmt	For	For	For
1h	Elect Director Johnese M. Spisso	Mgmt	For	For	For
1i	Elect Director Kathryn M. Sullivan	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Amgen Inc.

Meeting Date: 05/23/2025

Record Date: 03/24/2025

Primary Security ID: 031162100

Country: USA

Meeting Type: Annual

Ticker: AMGN

Shares Voted: 2,655

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda M. Austin	Mgmt	For	For	For
1b	Elect Director Robert A. Bradway	Mgmt	For	For	For
1c	Elect Director Michael V. Drake	Mgmt	For	For	For
1d	Elect Director Brian J. Druker	Mgmt	For	For	For
1e	Elect Director Robert A. Eckert	Mgmt	For	For	For
1f	Elect Director Greg C. Garland	Mgmt	For	For	For
1g	Elect Director Charles M. Holley, Jr.	Mgmt	For	For	For

Amgen Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director S. Omar Ishrak	Mgmt	For	For	For
1i	Elect Director Tyler Jacks	Mgmt	For	For	For
1j	Elect Director Mary E. Klotman	Mgmt	For	For	For
1k	Elect Director Ellen J. Kullman	Mgmt	For	For	For
1l	Elect Director Amy E. Miles	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

LyondellBasell Industries N.V.

Meeting Date: 05/23/2025Country: NetherlandsTicker: LYB

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

Primary Security ID: N53745100

Shares Voted: 1,348

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jacques Aigrain	Mgmt	For	For	For
1b	Elect Director Lincoln Benet	Mgmt	For	For	For
1c	Elect Director Robin Buchanan	Mgmt	For	For	For
1d	Elect Director Anthony Chase	Mgmt	For	For	For
1e	Elect Director Robert Dudley	Mgmt	For	For	For
1f	Elect Director Claire Farley	Mgmt	For	For	For
1g	Elect Director Rita Griffin	Mgmt	For	For	For
1h	Elect Director Michael Hanley	Mgmt	For	For	For
1i	Elect Director Virginia Kamsky	Mgmt	For	For	For
1j	Elect Director Bridget Karlin	Mgmt	For	For	For
1k	Elect Director Albert Manifold	Mgmt	For	For	For
1l	Elect Director Peter Vanacker	Mgmt	For	For	For
2	Approve Discharge of Directors	Mgmt	For	For	For
3	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers Accountants N.V. as Auditors	Mgmt	For	For	For
5	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

LyondellBasell Industries N.V.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
7	Authorize Repurchase of Up to 10 Percent of Issued Share Capital	Mgmt	For	For	For
8	Approve Cancellation of Shares	Mgmt	For	For	For

SBA Communications Corporation

Meeting Date: 05/23/2025Country: USATicker: SBAC

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

Primary Security ID: 78410G104

Shares Voted: 509

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kevin L. Beebe	Mgmt	For	For	For
1.2	Elect Director Jack Langer	Mgmt	For	For	For
1.3	Elect Director Jeffrey A. Stoops	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Builders FirstSource, Inc.

Meeting Date: 05/27/2025Country: USATicker: BLDR

Record Date: 03/28/2025Meeting Type: Annual

Primary Security ID: 12008R107

Shares Voted: 539

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mark A. Alexander	Mgmt	For	For	For
1.2	Elect Director Dirkson R. Charles	Mgmt	For	For	For
1.3	Elect Director Peter M. Jackson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For



Builders FirstSource, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Declassify the Board of Directors	Mgmt	For	For	For
5	Remove the Board Size Range	Mgmt	For	Against	Against
6	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For

Merck & Co., Inc.

Meeting Date: 05/27/2025

Record Date: 03/28/2025

Primary Security ID: 58933Y105

Country: USA

Meeting Type: Annual

Ticker: MRK

Shares Voted: 12,327

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Douglas M. Baker, Jr.	Mgmt	For	For	For
1b	Elect Director Mary Ellen Coe	Mgmt	For	For	For
1c	Elect Director Pamela J. Craig	Mgmt	For	For	For
1d	Elect Director Robert M. Davis	Mgmt	For	For	For
1e	Elect Director Thomas H. Glocer	Mgmt	For	For	For
1f	Elect Director Surendralal "Lal" L. Karsanbhai	Mgmt	For	For	For
1g	Elect Director Risa J. Lavizzo-Mourey	Mgmt	For	For	For
1h	Elect Director Stephen L. Mayo	Mgmt	For	For	For
1i	Elect Director Paul B. Rothman	Mgmt	For	For	For
1j	Elect Director Patricia F. Russo	Mgmt	For	For	For
1k	Elect Director Christine E. Seidman	Mgmt	For	For	For
1l	Elect Director Inge G. Thulin	Mgmt	For	For	For
1m	Elect Director Kathy J. Warden	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on a Human Rights Impact Assessment	SH	Against	Against	Against
5	Publish Tax Transparency Report	SH	Against	Against	Against

Merck & Co., Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Consider Eliminating DEI Goals from Compensation Plan Incentives	SH	Against	Against	Against
7	Report on Risks of Discriminating Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against

The Trade Desk, Inc.

Meeting Date: 05/27/2025

Record Date: 03/31/2025

Primary Security ID: 88339J105

Country: USA

Meeting Type: Annual

Ticker: TTD

Shares Voted: 2,170

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Lise J. Buyer	Mgmt	For	Withhold	Withhold
1.2	Elect Director Kathryn E. Falberg	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Chevron Corporation

Meeting Date: 05/28/2025

Record Date: 03/31/2025

Primary Security ID: 166764100

Country: USA

Meeting Type: Annual

Ticker: CVX

Shares Voted: 8,296

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda M. Austin	Mgmt	For	For	For
1b	Elect Director John B. Frank	Mgmt	For	For	For
1c	Elect Director Alice P. Gast	Mgmt	For	For	For
1d	Elect Director Enrique Hernandez, Jr.	Mgmt	For	For	For
1e	Elect Director Marillyn A. Hewson	Mgmt	For	For	For
1f	Elect Director Jon M. Huntsman, Jr.	Mgmt	For	For	For

## Chevron Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Charles W. Moorman	Mgmt	For	For	For
1h	Elect Director Dambisa F. Moyo	Mgmt	For	For	For
1i	Elect Director Debra Reed-Klages	Mgmt	For	For	For
1j	Elect Director D. James Umpleby, III	Mgmt	For	For	For
1k	Elect Director Cynthia J. Warner	Mgmt	For	For	For
1l	Elect Director Michael K. (Mike) Wirth	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
5	Commission Third Party Assessment of Implementation of Human Rights Policy	SH	Against	Against	Against
6	Report on Risk of Reverse Stranded Assets of Investing in Renewables	SH	Against	Against	Against
7	Amend Right to Call Special Meeting	SH	Against	For	For

## Exxon Mobil Corporation

Meeting Date: 05/28/2025	Country: USA	Ticker: XOM
Record Date: 04/02/2025	Meeting Type: Annual	
Primary Security ID: 30231G102		

Shares Voted: 21,597

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael J. Angelakis	Mgmt	For	For	For
1.2	Elect Director Angela F. Braly	Mgmt	For	For	For
1.3	Elect Director Maria S. Dreyfus	Mgmt	For	For	For
1.4	Elect Director John D. Harris, II	Mgmt	For	For	For
1.5	Elect Director Kaisa H. Hietala	Mgmt	For	For	For
1.6	Elect Director Joseph L. Hooley	Mgmt	For	For	For
1.7	Elect Director Steven A. Kandarian	Mgmt	For	For	For

Exxon Mobil Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Alexander A. Karsner	Mgmt	For	For	For
1.9	Elect Director Lawrence W. Kellner	Mgmt	For	For	For
1.10	Elect Director Dina Powell McCormick	Mgmt	For	For	For
1.11	Elect Director Jeffrey W. Ubben	Mgmt	For	For	For
1.12	Elect Director Darren W. Woods	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

GE Healthcare Technologies, Inc.

Meeting Date: 05/28/2025

Country: USA

Ticker: GEHC

Record Date: 03/31/2025

Meeting Type: Annual

Primary Security ID: 36266G107

Shares Voted: 2,242

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter J. Arduini	Mgmt	For	For	For
1b	Elect Director H. Lawrence Culp, Jr.	Mgmt	For	For	For
1c	Elect Director Rodney F. Hochman	Mgmt	For	For	For
1d	Elect Director Lloyd W. Howell, Jr.	Mgmt	For	For	For
1e	Elect Director Risa Lavizzo-Mourey	Mgmt	For	For	For
1f	Elect Director Catherine Lesjak	Mgmt	For	For	For
1g	Elect Director Anne T. Madden	Mgmt	For	For	For
1h	Elect Director Tomislav Mihaljevic	Mgmt	For	For	For
1i	Elect Director William J. Stromberg	Mgmt	For	For	For
1j	Elect Director Phoebe L. Yang	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

GE Healthcare Technologies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

Howmet Aerospace Inc.

Meeting Date: 05/28/2025	Country: USA	Ticker: HWM
Record Date: 03/31/2025	Meeting Type: Annual	
Primary Security ID: 443201108		

Shares Voted: 1,976					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director James F. Albaugh	Mgmt	For	For	For
1b	Elect Director Amy E. Alving	Mgmt	For	For	For
1c	Elect Director Sharon R. Barner	Mgmt	For	For	For
1d	Elect Director Joseph S. Cantie	Mgmt	For	For	For
1e	Elect Director Robert F. Leduc	Mgmt	For	For	For
1f	Elect Director David J. Miller *Withdrawn Resolution*	Mgmt			
1g	Elect Director Jody G. Miller	Mgmt	For	For	For
1h	Elect Director John C. Plant	Mgmt	For	For	For
1i	Elect Director Ulrich R. Schmidt	Mgmt	For	For	For
1j	Elect Director Gunner S. Smith	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Meta Platforms, Inc.

Meeting Date: 05/28/2025	Country: USA	Ticker: META
Record Date: 04/01/2025	Meeting Type: Annual	
Primary Security ID: 30303M102		

Shares Voted: 10,640					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peggy Alford	Mgmt	For	Withhold	Withhold
1.2	Elect Director Marc L. Andreessen	Mgmt	For	Withhold	Withhold

Meta Platforms, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.3	Elect Director John Arnold	Mgmt	For	For	For
1.4	Elect Director Patrick Collison	Mgmt	For	For	For
1.5	Elect Director John Elkann	Mgmt	For	Withhold	Withhold
1.6	Elect Director Andrew W. Houston	Mgmt	For	Withhold	Withhold
1.7	Elect Director Nancy Killefer	Mgmt	For	For	For
1.8	Elect Director Robert M. Kimmitt	Mgmt	For	For	For
1.9	Elect Director Dina Powell McCormick	Mgmt	For	For	For
1.10	Elect Director Charles Songhurst	Mgmt	For	For	For
1.11	Elect Director Hock E. Tan	Mgmt	For	For	For
1.12	Elect Director Tracey T. Travis	Mgmt	For	For	For
1.13	Elect Director Dana White	Mgmt	For	For	For
1.14	Elect Director Tony Xu	Mgmt	For	Withhold	Withhold
1.15	Elect Director Mark Zuckerberg	Mgmt	For	Withhold	Withhold
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	Against	Against
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
5	Advisory Vote on Say on Pay Frequency	Mgmt	Three Years	One Year	One Year
6	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
7	Disclosure of Voting Results Based on Class of Shares	SH	Against	For	For
8	Report on Hate Targeting Marginalized Communities	SH	Against	For	For
9	Report on Child Safety and Harm Reduction	SH	Against	Against	Against
10	Report on Combatting Risks of Online Child Exploitation	SH	Against	Against	Against
11	Report on Risks of Unethical Use of External Data to Develop AI Products	SH	Against	For	For
12	Disclose a Climate Transition Plan Resulting in New Renewable Energy Capacity	SH	Against	Against	Against
13	Report on Investing in Bitcoin	SH	Against	Against	Against
14	Report on Data Collection and Advertising Practices	SH	Against	For	For

Royal Caribbean Cruises Ltd.

Meeting Date: 05/28/2025

Record Date: 04/10/2025

Primary Security ID: V7780T103

Country: Liberia

Meeting Type: Annual

Ticker: RCL

Shares Voted: 1,273

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John F. Brock	Mgmt	For	For	For
1b	Elect Director Richard D. Fain	Mgmt	For	For	For
1c	Elect Director Stephen R. Howe, Jr.	Mgmt	For	For	For
1d	Elect Director Michael O. Leavitt	Mgmt	For	For	For
1e	Elect Director Jason T. Liberty	Mgmt	For	For	For
1f	Elect Director Amy McPherson	Mgmt	For	For	For
1g	Elect Director Maritza G. Montiel	Mgmt	For	For	For
1h	Elect Director Ann S. Moore	Mgmt	For	For	For
1i	Elect Director Eyal M. Ofer	Mgmt	For	For	For
1j	Elect Director Vagn O. Sørensen	Mgmt	For	For	For
1k	Elect Director Donald Thompson	Mgmt	For	For	For
1l	Elect Director Arne Alexander Wilhelmsen	Mgmt	For	For	For
1m	Elect Director Rebecca Yeung	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Axon Enterprise, Inc.

Meeting Date: 05/29/2025

Record Date: 03/31/2025

Primary Security ID: 05464C101

Country: USA

Meeting Type: Annual

Ticker: AXON

Shares Voted: 349

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Erika Ayers Badan	Mgmt	For	For	For
1B	Elect Director Adriane Brown	Mgmt	For	For	For

Axon Enterprise, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1C	Elect Director Julie Anne Cullivan	Mgmt	For	For	For
1D	Elect Director Michael Garnreiter	Mgmt	For	For	For
1E	Elect Director Caitlin Kalinowski	Mgmt	For	For	For
1F	Elect Director Matthew McBrady	Mgmt	For	For	For
1G	Elect Director Hadi Partovi	Mgmt	For	For	For
1H	Elect Director Graham Smith	Mgmt	For	For	For
1I	Elect Director Patrick Smith	Mgmt	For	For	For
1J	Elect Director Jeri Williams	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Dollar General Corporation

Meeting Date: 05/29/2025Country: USATicker: DG

Record Date: 03/20/2025Meeting Type: Annual

Primary Security ID: 256677105

Shares Voted: 1,063

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Warren F. Bryant	Mgmt	For	For	For
1b	Elect Director Michael M. Calbert	Mgmt	For	For	For
1c	Elect Director Ana M. Chadwick	Mgmt	For	For	For
1d	Elect Director Timothy I. McGuire	Mgmt	For	For	For
1e	Elect Director David P. Rowland	Mgmt	For	For	For
1f	Elect Director Debra A. Sandler	Mgmt	For	For	For
1g	Elect Director Ralph E. Santana	Mgmt	For	For	For
1h	Elect Director Kathleen M. Scarlett	Mgmt	For	For	For
1i	Elect Director Todd J. Vasos	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For



Dollar General Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against
5	Adopt a Comprehensive Human Rights Policy	SH	Against	Against	Against
6	Report on Food Waste Management and Targets to Reduce Food Waste	SH	Against	Against	Against
7	Report on Employee Access to Timely, Quality Healthcare	SH	Against	Against	Against

Gartner, Inc.

Meeting Date: 05/29/2025	Country: USA	Ticker: IT
Record Date: 04/04/2025	Meeting Type: Annual	
Primary Security ID: 366651107		

Shares Voted: 373

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Peter E. Bisson	Mgmt	For	For	For
1b	Elect Director Richard J. Bressler	Mgmt	For	For	For
1c	Elect Director Raul E. Cesan	Mgmt	For	For	For
1d	Elect Director Karen E. Dykstra	Mgmt	For	For	For
1e	Elect Director Diana S. Ferguson	Mgmt	For	For	For
1f	Elect Director Anne Sutherland Fuchs	Mgmt	For	For	For
1g	Elect Director William O. Grabe	Mgmt	For	For	For
1h	Elect Director José M. Gutiérrez	Mgmt	For	For	For
1i	Elect Director Eugene A. Hall	Mgmt	For	For	For
1j	Elect Director Stephen G. Pagliuca	Mgmt	For	For	For
1k	Elect Director Eileen M. Serra	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

# Iron Mountain Incorporated

Meeting Date: 05/29/2025

Country: USA

Ticker: IRM

Record Date: 04/01/2025

Meeting Type: Annual

Primary Security ID: 46284V101

Shares Voted: 1,424

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jennifer Allerton	Mgmt	For	For	For
1b	Elect Director Pamela M. Arway	Mgmt	For	For	For
1c	Elect Director Kent P. Dauten	Mgmt	For	For	For
1d	Elect Director June Y. Felix	Mgmt	For	For	For
1e	Elect Director Monte Ford	Mgmt	For	For	For
1f	Elect Director Robin L. Matlock	Mgmt	For	For	For
1g	Elect Director William L. Meaney	Mgmt	For	For	For
1h	Elect Director Walter C. Rakowich	Mgmt	For	For	For
1i	Elect Director Theodore R. Samuels	Mgmt	For	For	For
1j	Elect Director Doyle R. Simons	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

# Roblox Corporation

Meeting Date: 05/29/2025

Country: USA

Ticker: RBLX

Record Date: 04/11/2025

Meeting Type: Annual

Primary Security ID: 771049103

Shares Voted: 2,645

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Christopher Carvalho	Mgmt	For	Withhold	Withhold
1.2	Elect Director Gina Mastantuono	Mgmt	For	For	For
1.3	Elect Director Jason Kilar	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Roblox Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Change State of Incorporation from Delaware to Nevada	Mgmt	For	Against	Against

The Allstate Corporation

Meeting Date: 05/29/2025	Country: USA	Ticker: ALL
Record Date: 03/31/2025	Meeting Type: Annual	
Primary Security ID: 020002101		

Shares Voted: 1,284					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Donald E. Brown	Mgmt	For	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For	For
1c	Elect Director Richard T. Hume	Mgmt	For	For	For
1d	Elect Director Margaret M. Keane	Mgmt	For	For	For
1e	Elect Director Siddharth N. (Bobby) Mehta	Mgmt	For	For	For
1f	Elect Director Maria R. Morris	Mgmt	For	For	For
1g	Elect Director Jacques P. Perold	Mgmt	For	For	For
1h	Elect Director Andrea Redmond	Mgmt	For	For	For
1i	Elect Director Gregg M. Sherrill	Mgmt	For	For	For
1j	Elect Director Judith A. Sprieser	Mgmt	For	For	For
1k	Elect Director Perry M. Traquina	Mgmt	For	For	For
1l	Elect Director Monica J. Turner	Mgmt	For	For	For
1m	Elect Director Thomas J. Wilson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Zimmer Biomet Holdings, Inc.

Meeting Date: 05/29/2025	Country: USA	Ticker: ZBH
Record Date: 04/02/2025	Meeting Type: Annual	
Primary Security ID: 98956P102		

Zimmer Biomet Holdings, Inc.

Shares Voted: 970

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Betsy J. Bernard	Mgmt	For	For	For
1b	Elect Director Michael J. Farrell	Mgmt	For	For	For
1c	Elect Director Robert A. Hagemann	Mgmt	For	For	For
1d	Elect Director Arthur J. Higgins	Mgmt	For	For	For
1e	Elect Director Maria Teresa (Tessa) Hilado	Mgmt	For	For	For
1f	Elect Director Syed Jafray	Mgmt	For	For	For
1g	Elect Director Sreelakshmi Kolli	Mgmt	For	For	For
1h	Elect Director Devdatt (Dev) Kurdikar	Mgmt	For	For	For
1i	Elect Director Louis A. Shapiro	Mgmt	For	For	For
1j	Elect Director Ivan Tornos	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For

Arista Networks, Inc.

Meeting Date: 05/30/2025Country: USATicker: ANET

Record Date: 04/02/2025Meeting Type: Annual

Primary Security ID: 040413205

Shares Voted: 5,057

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Charles Giancarlo	Mgmt	For	For	For
1.2	Elect Director Daniel Scheinman	Mgmt	For	Withhold	Withhold
1.3	Elect Director Yvonne Wassenaar	Mgmt	For	Withhold	Withhold
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Arista Networks, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Lowe's Companies, Inc.

Meeting Date: 05/30/2025	Country: USA	Ticker: LOW
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 548661107		

Shares Voted: 2,810					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Raul Alvarez	Mgmt	For	For	For
1.2	Elect Director Scott H. Baxter	Mgmt	For	For	For
1.3	Elect Director Sandra B. Cochran	Mgmt	For	For	For
1.4	Elect Director Laurie Z. Douglas	Mgmt	For	For	For
1.5	Elect Director Richard W. Dreiling	Mgmt	For	For	For
1.6	Elect Director Marvin R. Ellison	Mgmt	For	For	For
1.7	Elect Director Navdeep Gupta	Mgmt	For	For	For
1.8	Elect Director Brian C. Rogers	Mgmt	For	For	For
1.9	Elect Director Bertram L. Scott	Mgmt	For	For	For
1.10	Elect Director Lawrence Simkins	Mgmt	For	For	For
1.11	Elect Director Colleen Taylor	Mgmt	For	For	For
1.12	Elect Director Mary Beth West	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	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		

UnitedHealth Group Incorporated

Shares Voted: 4,659

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

Warner Bros. Discovery, Inc.

Meeting Date: 06/02/2025Country: USATicker: WBD

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

Primary Security ID: 934423104

Shares Voted: 11,407

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Samuel A. Di Piazza, Jr.	Mgmt	For	For	For
1.2	Elect Director Richard W. Fisher	Mgmt	For	For	For
1.3	Elect Director Paul A. Gould	Mgmt	For	For	For
1.4	Elect Director Debra L. Lee	Mgmt	For	For	For
1.5	Elect Director Joseph M. Levin	Mgmt	For	For	For
1.6	Elect Director Anton J. Levy	Mgmt	For	For	For
1.7	Elect Director Kenneth W. Lowe	Mgmt	For	For	For

Warner Bros. Discovery, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.8	Elect Director Fazal F. Merchant	Mgmt	For	For	For
1.9	Elect Director Anthony J. Noto	Mgmt	For	For	For
1.10	Elect Director Paula A. Price	Mgmt	For	For	For
1.11	Elect Director Daniel E. Sanchez	Mgmt	For	For	For
1.12	Elect Director Geoffrey Y. Yang	Mgmt	For	For	For
1.13	Elect Director David M. Zaslav	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Provide Right to Call Special Meeting	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

Booking Holdings Inc.

Meeting Date: 06/03/2025

Record Date: 04/08/2025

Primary Security ID: 09857L108

Country: USA

Meeting Type: Annual

Ticker: BKNG

Shares Voted: 162

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Glenn D. Fogel	Mgmt	For	For	For
1.2	Elect Director Mirian M. Graddick-Weir	Mgmt	For	For	For
1.3	Elect Director Kelly Grier	Mgmt	For	For	For
1.4	Elect Director Robert J. Mylod, Jr.	Mgmt	For	For	For
1.5	Elect Director Charles H. Noski	Mgmt	For	For	For
1.6	Elect Director Larry Quinlan	Mgmt	For	For	For
1.7	Elect Director Nicholas J. Read	Mgmt	For	For	For
1.8	Elect Director Thomas E. Rothman	Mgmt	For	For	For
1.9	Elect Director Sumit Singh	Mgmt	For	For	For
1.10	Elect Director Lynn Vojvodich Radakovich	Mgmt	For	For	For
1.11	Elect Director Vanessa A. Wittman	Mgmt	For	For	For

Booking Holdings Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Cognizant Technology Solutions Corporation

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

Record Date: 04/07/2025Meeting Type: Annual

Primary Security ID: 192446102

Shares Voted: 2,437

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Zein Abdalla	Mgmt	For	For	For
1b	Elect Director Vinita Bali	Mgmt	For	For	For
1c	Elect Director Eric Branderiz	Mgmt	For	For	For
1d	Elect Director Archana Deskus	Mgmt	For	For	For
1e	Elect Director John M. Dineen	Mgmt	For	For	For
1f	Elect Director Ravi Kumar S	Mgmt	For	For	For
1g	Elect Director Leo S. Mackay, Jr.	Mgmt	For	For	For
1h	Elect Director Michael Patsalos-Fox	Mgmt	For	For	For
1i	Elect Director Stephen "Steve" J. Rohleder	Mgmt	For	For	For
1j	Elect Director Abraham "Bram" Schot	Mgmt	For	For	For
1k	Elect Director Karima Silvent	Mgmt	For	For	For
1l	Elect Director Joseph M. Velli	Mgmt	For	For	For
1m	Elect Director Sandra S. Wijnberg	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against	Against



Datadog, Inc.

Meeting Date: 06/03/2025

Record Date: 04/09/2025

Primary Security ID: 23804L103

Country: USA

Meeting Type: Annual

Ticker: DDOG

Shares Voted: 1,546

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Titi Cole	Mgmt	For	Withhold	Withhold
1b	Elect Director Matthew Jacobson	Mgmt	For	Withhold	Withhold
1c	Elect Director Julie G. Richardson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	Against	Against

Expedia Group, Inc.

Meeting Date: 06/03/2025

Record Date: 04/04/2025

Primary Security ID: 30212P303

Country: USA

Meeting Type: Annual

Ticker: EXPE

Shares Voted: 595

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Beverly Anderson	Mgmt	For	For	For
1b	Elect Director M. Moina Banerjee	Mgmt	For	For	For
1c	Elect Director Chelsea Clinton	Mgmt	For	For	For
1d	Elect Director Barry Diller	Mgmt	For	Withhold	Withhold
1e	Elect Director Henrique Dubugras	Mgmt	For	For	For
1f	Elect Director Ariane Gorin	Mgmt	For	For	For
1g	Elect Director Craig Jacobson	Mgmt	For	For	For
1h	Elect Director Dara Khosrowshahi	Mgmt	For	For	For
1i	Elect Director Patricia Menendez Cambo	Mgmt	For	For	For
1j	Elect Director Alex von Furstenberg	Mgmt	For	For	For
1k	Elect Director Alexandr Wang	Mgmt	For	For	For

Expedia Group, Inc.

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

Fortive Corporation

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

Record Date: 04/07/2025Meeting Type: Annual

Primary Security ID: 34959J108

Shares Voted: 1,693					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Eric Branderiz	Mgmt	For	For	For
1b	Elect Director Daniel L. Comas	Mgmt	For	For	For
1c	Elect Director Sharmistha Dubey	Mgmt	For	For	For
1d	Elect Director Rejji P. Hayes	Mgmt	For	For	For
1e	Elect Director Wright L. Lassiter, III	Mgmt	For	For	For
1f	Elect Director James A. Lico	Mgmt	For	For	For
1g	Elect Director Kate D. Mitchell	Mgmt	For	For	For
1h	Elect Director Gregory J. Moore	Mgmt	For	For	For
1i	Elect Director Jeannine P. Sargent	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

General Motors Company

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

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

Primary Security ID: 37045V100

# General Motors Company

Shares Voted: 5,570

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mary T. Barra	Mgmt	For	For	For
1b	Elect Director Wesley G. Bush	Mgmt	For	For	For
1c	Elect Director Joanne C. Crevoiserat	Mgmt	For	For	For
1d	Elect Director Joseph Jimenez	Mgmt	For	For	For
1e	Elect Director Alfred F. Kelly, Jr.	Mgmt	For	For	For
1f	Elect Director Jonathan McNeill	Mgmt	For	For	For
1g	Elect Director Judith A. Miscik	Mgmt	For	For	For
1h	Elect Director Patricia F. Russo	Mgmt	For	For	For
1i	Elect Director Mark A. Tatum	Mgmt	For	For	For
1j	Elect Director Jan E. Tighe	Mgmt	For	For	For
1k	Elect Director Devin N. Wenig	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For
5	Report on Supply Chain GHG Emissions Reduction Strategies	SH	Against	Against	Against

# Airbnb, Inc.

Meeting Date: 06/04/2025

Record Date: 04/07/2025

Primary Security ID: 009066101

Country: USA

Meeting Type: Annual

Ticker: ABNB

Shares Voted: 2,073

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Amrita Ahuja	Mgmt	For	For	For
1.2	Elect Director Joseph Gebbia	Mgmt	For	Withhold	Withhold
1.3	Elect Director Jeffrey Jordan	Mgmt	For	Withhold	Withhold
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Airbnb, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Disclosure of Voting Results Based on Class of Shares	SH	Against	For	For

AppLovin Corporation

Meeting Date: 06/04/2025Country: USATicker: APP

Record Date: 04/10/2025Meeting Type: Annual

Primary Security ID: 03831W108

Shares Voted: 1,150					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Adam Foroughi	Mgmt	For	Withhold	Withhold
1b	Elect Director Craig Billings	Mgmt	For	For	For
1c	Elect Director Herald Chen	Mgmt	For	Withhold	Withhold
1d	Elect Director Margaret Georgiadis	Mgmt	For	Withhold	Withhold
1e	Elect Director Alyssa Harvey Dawson	Mgmt	For	Withhold	Withhold
1f	Elect Director Barbara Messing	Mgmt	For	Withhold	Withhold
1g	Elect Director Todd Morgenfeld	Mgmt	For	For	For
1h	Elect Director Eduardo Vivas	Mgmt	For	For	For
1i	Elect Director Maynard Webb	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Devon Energy Corporation.

Meeting Date: 06/04/2025Country: USATicker: DVN

Record Date: 04/10/2025Meeting Type: Annual

Primary Security ID: 25179M103

Shares Voted: 3,336					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Barbara M. Baumann	Mgmt	For	For	For
1.2	Elect Director John E. Bethancourt	Mgmt	For	For	For
1.3	Elect Director Ann G. Fox	Mgmt	For	For	For

Devon Energy Corporation.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Clay M. Gaspar	Mgmt	For	For	For
1.5	Elect Director Gennifer F. Kelly	Mgmt	For	For	For
1.6	Elect Director Kelt Kindick	Mgmt	For	For	For
1.7	Elect Director Karl F. Kurz	Mgmt	For	For	For
1.8	Elect Director Michael N. Mears	Mgmt	For	For	For
1.9	Elect Director Robert A. Mosbacher, Jr.	Mgmt	For	For	For
1.10	Elect Director Valerie M. Williams	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Amend Right to Call Special Meeting	SH	Against	Against	Against

GoDaddy Inc.

Meeting Date: 06/04/2025Country: USATicker: GDDY

Record Date: 04/07/2025Meeting Type: Annual

Primary Security ID: 380237107

Shares Voted: 664					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Amanpal (Aman) Bhutani	Mgmt	For	For	For
1b	Elect Director Herald Chen	Mgmt	For	For	For
1c	Elect Director Caroline Donahue	Mgmt	For	For	For
1d	Elect Director Mark Garrett	Mgmt	For	For	For
1e	Elect Director Brian Sharples	Mgmt	For	For	For
1f	Elect Director Graham Smith	Mgmt	For	For	For
1g	Elect Director Leah Sweet	Mgmt	For	For	For
1h	Elect Director Srinivas (Srini) Tallapragada	Mgmt	For	For	For
1i	Elect Director Sigal Zarmi	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

GoDaddy Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Amend Certificate of Incorporation to Limit the Liability of Officers	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Implement Miscellaneous Changes	Mgmt	For	For	For

HubSpot, Inc.

Meeting Date: 06/04/2025

Country: USA

Ticker: HUBS

Record Date: 04/15/2025

Meeting Type: Annual

Primary Security ID: 443573100

Shares Voted: 244

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lorrie M. Norrington	Mgmt	For	For	For
1b	Elect Director Andrew Anagnost	Mgmt	For	For	For
1c	Elect Director Dharmesh Shah	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Declassify the Board of Directors	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement	Mgmt	For	For	For
6	Adopt Simple Majority Vote	SH	Against	For	For

Super Micro Computer, Inc.

Meeting Date: 06/04/2025

Country: USA

Ticker: SMCI

Record Date: 04/07/2025

Meeting Type: Annual

Primary Security ID: 86800U302

Shares Voted: 49

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert Blair	Mgmt	For	For	For
1b	Elect Director Susan Mogensen (Susie Giordano)	Mgmt	For	For	For

Super Micro Computer, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify BDO USA, P.C. as Auditors	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against

Workday, Inc.

Meeting Date: 06/04/2025

Record Date: 04/07/2025

Primary Security ID: 98138H101

Country: USA

Meeting Type: Annual

Ticker: WDAY

Shares Voted: 1,049

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carl M. Eschenbach	Mgmt	For	For	For
1b	Elect Director Michael M. McNamara	Mgmt	For	Against	Against
1c	Elect Director Michael L. Speiser	Mgmt	For	For	For
1d	Elect Director Jerry Yang	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Cloudflare, Inc.

Meeting Date: 06/05/2025

Record Date: 04/10/2025

Primary Security ID: 18915M107

Country: USA

Meeting Type: Annual

Ticker: NET

Shares Voted: 1,534

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Stacey Cunningham	Mgmt	For	For	For
1.2	Elect Director Mark Hawkins	Mgmt	For	For	For
1.3	Elect Director Carl Ledbetter	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Cloudflare, Inc.

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

EMCOR Group, Inc.

**Meeting Date:** 06/05/2025

**Country:** USA

**Ticker:** EME

**Record Date:** 04/08/2025

**Meeting Type:** Annual

**Primary Security ID:** 29084Q100

Shares Voted: 217

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John W. Altmeyer	Mgmt	For	For	For
1b	Elect Director Amy E. Dahl	Mgmt	For	For	For
1c	Elect Director Anthony J. Guzzi	Mgmt	For	For	For
1d	Elect Director Ronald L. Johnson	Mgmt	For	For	For
1e	Elect Director Carol P. Lowe	Mgmt	For	For	For
1f	Elect Director M. Kevin McEvoy	Mgmt	For	For	For
1g	Elect Director William P. Reid	Mgmt	For	For	For
1h	Elect Director Steven B. Schwarzwaelder	Mgmt	For	For	For
1i	Elect Director Robin Walker-Lee	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Restricted Stock Plan	Mgmt	For	For	For

Expand Energy Corporation

**Meeting Date:** 06/05/2025

**Country:** USA

**Ticker:** EXE

**Record Date:** 04/07/2025

**Meeting Type:** Annual

**Primary Security ID:** 165167735

Shares Voted: 1,047

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Domenic J. "Nick" Dell'Osso, Jr.	Mgmt	For	For	For



Expand Energy Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Timothy S. Duncan	Mgmt	For	For	For
1c	Elect Director Benjamin C. Duster, IV	Mgmt	For	For	For
1d	Elect Director Sarah A. Emerson	Mgmt	For	For	For
1e	Elect Director Matthew M. Gallagher	Mgmt	For	For	For
1f	Elect Director John D. Gass	Mgmt	For	For	For
1g	Elect Director S.P. "Chip" Johnson, IV	Mgmt	For	For	For
1h	Elect Director Catherine A. Kehr	Mgmt	For	For	For
1i	Elect Director Shameek Konar	Mgmt	For	For	For
1j	Elect Director Brian Steck	Mgmt	For	For	For
1k	Elect Director Michael A. Wichterich	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Flutter Entertainment plc

Meeting Date: 06/05/2025

Record Date: 04/10/2025

Primary Security ID: G3643J108

Country: Ireland

Meeting Type: Annual

Ticker: FLUT

Shares Voted: 900					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director John A. Bryant	Mgmt	For	For	For
1b	Elect Director Peter Jackson	Mgmt	For	For	For
1c	Elect Director Robert (Dob) Bennett	Mgmt	For	For	For
1d	Elect Director Nancy Cruickshank	Mgmt	For	For	For
1e	Elect Director Nancy Dubuc	Mgmt	For	For	For
1f	Elect Director Alfred F. Hurley, Jr.	Mgmt	For	For	For
1g	Elect Director Holly Keller Koeppel	Mgmt	For	For	For
1h	Elect Director Carolan Lennon	Mgmt	For	For	For

Flutter Entertainment plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Christine M. McCarthy	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
6	Amend Sharesave Scheme	Mgmt	For	For	For
7a	Ratify KPMG as Auditors	Mgmt	For	For	For
7b	Authorise Board to Fix Remuneration of Auditors	Mgmt	For	For	For
8	Authorize Board to Issue of Shares	Mgmt	For	For	For
9	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
10	Authorise Market Purchase of Ordinary Shares	Mgmt	For	For	For
11	Authorise the Company to Determine the Price Range at which Treasury Shares may be Re-issued Off-Market	Mgmt	For	For	For

Netflix, Inc.

Meeting Date: 06/05/2025

Record Date: 04/07/2025

Primary Security ID: 64110L106

Country: USA

Meeting Type: Annual

Ticker: NFLX

Shares Voted: 2,069					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard N. Barton	Mgmt	For	For	For
1b	Elect Director Mathias Dopfner	Mgmt	For	For	For
1c	Elect Director Reed Hastings	Mgmt	For	For	For
1d	Elect Director Jay C. Hoag	Mgmt	For	Against	Against
1e	Elect Director Leslie Kilgore	Mgmt	For	For	For
1f	Elect Director Strive Masiyiwa	Mgmt	For	For	For
1g	Elect Director Ann Mather	Mgmt	For	For	For
1h	Elect Director Greg Peters	Mgmt	For	For	For
1i	Elect Director Susan E. Rice	Mgmt	For	For	For

Netflix, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Ted Sarandos	Mgmt	For	For	For
1k	Elect Director Bradford L. Smith	Mgmt	For	For	For
1l	Elect Director Anne M. Sweeney	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Issue a Climate Transition Plan	SH	Against	Against	Against
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For
6	Amend Code of Ethics to Enhance Policies on Non-Discrimination, Anti-Harassment, and Whistleblower Protection	SH	Against	Against	Against
7	Report on Discrimination Risks of Affirmative Action Initiatives	SH	Against	Against	Against
8	Report on Discrimination in Charitable Giving	SH	Against	Against	Against

Palantir Technologies, Inc.

Meeting Date: 06/05/2025

Country: USA

Ticker: PLTR

Record Date: 04/11/2025

Meeting Type: Annual

Primary Security ID: 69608A108

Shares Voted: 10,542

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alexander Karp	Mgmt	For	Withhold	Withhold
1.2	Elect Director Stephen Cohen	Mgmt	For	Withhold	Withhold
1.3	Elect Director Peter Thiel	Mgmt	For	Withhold	Withhold
1.4	Elect Director Alexander Moore	Mgmt	For	Withhold	Withhold
1.5	Elect Director Alexandra Schiff	Mgmt	For	Withhold	Withhold
1.6	Elect Director Lauren Friedman Stat	Mgmt	For	For	For
1.7	Elect Director Eric Woersching	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

PayPal Holdings, Inc.

Meeting Date: 06/05/2025

Record Date: 04/09/2025

Primary Security ID: 70450Y103

Country: USA

Meeting Type: Annual

Ticker: PYPL

Shares Voted: 5,128

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Joy Chik	Mgmt	For	For	For
1b	Elect Director Alex Chriss	Mgmt	For	For	For
1c	Elect Director Jonathan Christodoro	Mgmt	For	For	For
1d	Elect Director Carmine Di Sibio	Mgmt	For	For	For
1e	Elect Director David W. Dorman	Mgmt	For	For	For
1f	Elect Director Enrique J. Lores	Mgmt	For	For	For
1g	Elect Director Gail J. McGovern	Mgmt	For	For	For
1h	Elect Director Deborah M. Messemer	Mgmt	For	For	For
1i	Elect Director David M. Moffett	Mgmt	For	For	For
1j	Elect Director Ann M. Sarnoff	Mgmt	For	For	For
1k	Elect Director Frank D. Yeary	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against
6	Reduce Ownership Threshold for Shareholders to Call Special Meeting to 10%	SH	Against	For	For

Salesforce, Inc.

Meeting Date: 06/05/2025

Record Date: 04/11/2025

Primary Security ID: 79466L302

Country: USA

Meeting Type: Annual

Ticker: CRM

Shares Voted: 4,865

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marc Benioff	Mgmt	For	For	For
1b	Elect Director Laura Alber	Mgmt	For	For	For

Salesforce, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Craig Conway	Mgmt	For	For	For
1d	Elect Director Arnold Donald	Mgmt	For	For	For
1e	Elect Director Parker Harris	Mgmt	For	For	For
1f	Elect Director Neelie Kroes	Mgmt	For	For	For
1g	Elect Director Sachin Mehra	Mgmt	For	For	For
1h	Elect Director G. Mason Morfit	Mgmt	For	For	For
1i	Elect Director Oscar Munoz	Mgmt	For	For	For
1j	Elect Director John V. Roos	Mgmt	For	For	For
1k	Elect Director Robin Washington	Mgmt	For	For	For
1l	Elect Director Maynard Webb	Mgmt	For	For	For
2	Amend Omnibus Stock Plan	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Trane Technologies Plc

Meeting Date: 06/05/2025Country: IrelandTicker: TT

Record Date: 04/10/2025Meeting Type: Annual

Primary Security ID: G8994E103

Shares Voted: 1,146

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Kirk E. Arnold	Mgmt	For	For	For
1b	Elect Director Ana P. Assis	Mgmt	For	For	For
1c	Elect Director Ann C. Berzin	Mgmt	For	For	For
1d	Elect Director April Miller Boise	Mgmt	For	For	For
1e	Elect Director Mark R. George	Mgmt	For	For	For
1f	Elect Director John A. Hayes	Mgmt	For	For	For
1g	Elect Director Linda P. Hudson	Mgmt	For	For	For
1h	Elect Director Myles P. Lee	Mgmt	For	For	For
1i	Elect Director Matthew F. Pine	Mgmt	For	For	For
1j	Elect Director David S. Regnery	Mgmt	For	For	For
1k	Elect Director Melissa N. Schaeffer	Mgmt	For	For	For

Trane Technologies Plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director John P. Surma	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors and Authorise Their Remuneration	Mgmt	For	For	For
4	Authorize Issue of Equity	Mgmt	For	For	For
5	Authorize Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
6	Determine Price Range for Re-allotment of Treasury Shares	Mgmt	For	For	For

Walmart Inc.

Meeting Date: 06/05/2025

Country: USA

Ticker: WMT

Record Date: 04/11/2025

Meeting Type: Annual

Primary Security ID: 931142103

Shares Voted: 22,821

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cesar Conde	Mgmt	For	For	For
1b	Elect Director Timothy P. Flynn	Mgmt	For	For	For
1c	Elect Director Sarah J. Friar	Mgmt	For	For	For
1d	Elect Director Carla A. Harris	Mgmt	For	For	For
1e	Elect Director Thomas W. Horton	Mgmt	For	For	For
1f	Elect Director Marissa A. Mayer	Mgmt	For	For	For
1g	Elect Director C. Douglas McMillon	Mgmt	For	For	For
1h	Elect Director Robert E. Moritz, Jr.	Mgmt	For	For	For
1i	Elect Director Brian Niccol	Mgmt	For	For	For
1j	Elect Director Gregory B. Penner	Mgmt	For	For	For
1k	Elect Director Randall L. Stephenson	Mgmt	For	For	For
1l	Elect Director Steuart L. Walton	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Walmart Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Commission Third Party Assessment on Policies Regarding Law Enforcement Information Requests Related to Medication Use	SH	Against	Against	Against
6	Report on Reduction of Plastic Packaging and Recyclability Claims	SH	Against	Against	Against
7	Revisit Plastic Packaging Policies	SH	Against	Against	Against
8	Conduct and Report a Third-Party Racial Equity Audit	SH	Against	Against	Against
9	Report on Delays in Revising Diversity, Equity, and Inclusion (DEI) Initiatives	SH	Against	Against	Against
10	Report on Health and Safety Governance	SH	Against	Against	Against
11	Report on Risks of Discriminating Based on Religious and Political Views	SH	Against	Against	Against

Alphabet Inc.

Meeting Date: 06/06/2025

Record Date: 04/08/2025

Primary Security ID: 02079K305

Country: USA

Meeting Type: Annual

Ticker: GOOGL

Shares Voted: 29,609

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Larry Page	Mgmt	For	Against	Against
1b	Elect Director Sergey Brin	Mgmt	For	For	For
1c	Elect Director Sundar Pichai	Mgmt	For	For	For
1d	Elect Director John L. Hennessy	Mgmt	For	Against	Against
1e	Elect Director Frances H. Arnold	Mgmt	For	Against	Against
1f	Elect Director R. Martin "Marty" Chavez	Mgmt	For	For	For
1g	Elect Director L. John Doerr	Mgmt	For	Against	Against
1h	Elect Director Roger W. Ferguson, Jr.	Mgmt	For	For	For
1i	Elect Director K. Ram Shriram	Mgmt	For	Against	Against

Alphabet Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Robin L. Washington	Mgmt	For	Against	Against
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Provide Right to Act by Written Consent	SH	Against	Against	Against
4	Adjust Executive Compensation Metrics for Share Buybacks	SH	Against	Against	Against
5	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against
6	Consider Ending Participation in Human Rights Campaign's Corporate Equality Index	SH	Against	Against	Against
7	Report on Meeting 2030 Climate Goals	SH	Against	Against	Against
8	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
9	Report on Due Diligence Process to Assess Human Rights Risks in High-Risk Countries	SH	Against	Against	Against
10	Report on Risks of Discrimination in GenAI	SH	Against	Against	Against
11	Report on Risks of Improper Use of External Data in Development of AI Products	SH	Against	For	For
12	Publish a Human Rights Impact Assessment of AI Driven Targeted Advertising	SH	Against	For	For
13	Report on Lobbying and Child Safety Online	SH	Against	Against	Against
14	Adopt Metrics Evaluating YouTube Child Safety Policies	SH	Against	Against	Against

Apollo Global Management, Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: APO
Record Date: 04/14/2025	Meeting Type: Annual	
Primary Security ID: 03769M106		

Shares Voted: 2,091

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Marc Beilinson	Mgmt	For	Against	Against
1.2	Elect Director James Belardi	Mgmt	For	For	For
1.3	Elect Director Jessica Bibliowicz	Mgmt	For	For	For



Apollo Global Management, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Gary Cohn	Mgmt	For	For	For
1.5	Elect Director Kerry Murphy Healey	Mgmt	For	For	For
1.6	Elect Director Mitra Hormozi	Mgmt	For	Against	Against
1.7	Elect Director Pamela Joyner	Mgmt	For	For	For
1.8	Elect Director Scott Kleinman	Mgmt	For	For	For
1.9	Elect Director Brian Leach	Mgmt	For	For	For
1.10	Elect Director Pauline Richards	Mgmt	For	For	For
1.11	Elect Director Marc Rowan	Mgmt	For	For	For
1.12	Elect Director David Simon	Mgmt	For	For	For
1.13	Elect Director Lynn Swann	Mgmt	For	Against	Against
1.14	Elect Director Patrick Toomey	Mgmt	For	For	For
1.15	Elect Director James Zelter	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Ares Management Corporation

Meeting Date: 06/06/2025

Record Date: 04/07/2025

Primary Security ID: 03990B101

Country: USA

Meeting Type: Annual

Ticker: ARES

Shares Voted: 918					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael J Arougheti	Mgmt	For	Against	Against
1b	Elect Director Ashish Bhutani	Mgmt	For	For	For
1c	Elect Director Antoinette Bush	Mgmt	For	Against	Against
1d	Elect Director R. Kipp deVeer	Mgmt	For	Against	Against
1e	Elect Director Paul G. Joubert	Mgmt	For	For	For
1f	Elect Director David B. Kaplan	Mgmt	For	Against	Against
1g	Elect Director Michael Lynton	Mgmt	For	For	For
1h	Elect Director Eileen Naughton	Mgmt	For	For	For
1i	Elect Director Judy D. Olian	Mgmt	For	Against	Against
1j	Elect Director Antony P. Ressler	Mgmt	For	Against	Against
1k	Elect Director Bennett Rosenthal	Mgmt	For	Against	Against

Ares Management Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Advisory Vote on Say on Pay Frequency	Mgmt	Three Years	One Year	One Year

Digital Realty Trust, Inc.

Meeting Date: 06/06/2025	Country: USA	Ticker: DLR
Record Date: 04/07/2025	Meeting Type: Annual	
Primary Security ID: 253868103		

Shares Voted: 1,625

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director VeraLinn "Dash" Jamieson	Mgmt	For	For	For
1b	Elect Director Kevin J. Kennedy	Mgmt	For	For	For
1c	Elect Director William G. LaPerch	Mgmt	For	For	For
1d	Elect Director Jean F.H.P. Mandeville	Mgmt	For	For	For
1e	Elect Director Afshin Mohebbi	Mgmt	For	For	For
1f	Elect Director Mark R. Patterson	Mgmt	For	For	For
1g	Elect Director Andrew P. Power	Mgmt	For	For	For
1h	Elect Director Mary Hogan Preusse	Mgmt	For	For	For
1i	Elect Director Susan Swanezy	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Adopt a Policy on Human Right to Water	SH	Against	Against	Against

Garmin Ltd.

Meeting Date: 06/06/2025	Country: Switzerland	Ticker: GRMN
Record Date: 04/11/2025	Meeting Type: Annual	
Primary Security ID: H2906T109		

Shares Voted: 794

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For
2	Approve Allocation of Income and Dividends	Mgmt	For	For	For
3	Approve Dividends	Mgmt	For	For	For
4	Approve Discharge of Board and Senior Management	Mgmt	For	For	For
5a	Elect Director Susan M. Ball	Mgmt	For	For	For
5b	Elect Director Jonathan C. Burrell	Mgmt	For	For	For
5c	Elect Director Joseph J. Hartnett	Mgmt	For	For	For
5d	Elect Director Min H. Kao	Mgmt	For	For	For
5e	Elect Director Catherine A. Lewis	Mgmt	For	For	For
5f	Elect Director Clifton A. Pemble	Mgmt	For	For	For
6	Elect Min H. Kao as Board Chair	Mgmt	For	For	For
7a	Appoint Susan M. Ball as Member of the Compensation Committee	Mgmt	For	For	For
7b	Appoint Jonathan C. Burrell as Member of the Compensation Committee	Mgmt	For	For	For
7c	Appoint Joseph J. Hartnett as Member of the Compensation Committee	Mgmt	For	For	For
7d	Appoint Catherine A. Lewis as Member of the Compensation Committee	Mgmt	For	For	For
8	Designate Wuersch & Gering LLP as Independent Proxy	Mgmt	For	For	For
9	Ratify Ernst & Young LLP as Auditors and Ernst & Young Ltd as Statutory Auditor	Mgmt	For	For	For
10	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
11	Advisory Vote on the Swiss Statutory Compensation Report	Mgmt	For	For	For
12	Approve Non-Financial Report	Mgmt	For	For	For
13	Approve Fiscal Year 2026 Maximum Aggregate Compensation for the Executive Management	Mgmt	For	For	For

Garmin Ltd.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
14	Approve Maximum Aggregate Compensation for the Board of Directors for the Period Between the 2025 AGM and the 2026 AGM	Mgmt	For	For	For
15	Amend Articles to Reflect Changes in Capital	Mgmt	For	For	For

T-Mobile US, Inc.

Meeting Date: 06/06/2025

Record Date: 04/07/2025

Primary Security ID: 872590104

Country: USA

Meeting Type: Annual

Ticker: TMUS

Shares Voted: 2,410

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director André Almeida	Mgmt	For	Withhold	Withhold
1.2	Elect Director Marcelo Claure	Mgmt	For	For	For
1.3	Elect Director Thomas Dannenfeldt	Mgmt	For	For	For
1.4	Elect Director Srikant M. Datar	Mgmt	For	For	For
1.5	Elect Director Timotheus Höttges	Mgmt	For	Withhold	Withhold
1.6	Elect Director Christian P. Illek	Mgmt	For	Withhold	Withhold
1.7	Elect Director James J. Kavanaugh	Mgmt	For	For	For
1.8	Elect Director Raphael Kübler	Mgmt	For	Withhold	Withhold
1.9	Elect Director Thorsten Langheim	Mgmt	For	Withhold	Withhold
1.10	Elect Director Dominique Leroy	Mgmt	For	Withhold	Withhold
1.11	Elect Director Letitia A. Long	Mgmt	For	For	For
1.12	Elect Director G. Michael (Mike) Sievert	Mgmt	For	Withhold	Withhold
1.13	Elect Director Teresa A. Taylor	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Roper Technologies, Inc.

Meeting Date: 06/10/2025

Record Date: 04/16/2025

Primary Security ID: 776696106

Country: USA

Meeting Type: Annual

Ticker: ROP

Roper Technologies, Inc.

Shares Voted: 550

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Shellye L. Archambeau	Mgmt	For	For	For
1.2	Elect Director Amy Woods Brinkley	Mgmt	For	For	For
1.3	Elect Director Irene M. Esteves	Mgmt	For	For	For
1.4	Elect Director L. Neil Hunn	Mgmt	For	For	For
1.5	Elect Director Robert D. Johnson	Mgmt	For	For	For
1.6	Elect Director Thomas P. Joyce, Jr.	Mgmt	For	For	For
1.7	Elect Director John F. Murphy	Mgmt	For	For	For
1.8	Elect Director Laura G. Thatcher	Mgmt	For	For	For
1.9	Elect Director Richard F. Wallman	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

The TJX Companies, Inc.

Meeting Date: 06/10/2025Country: USATicker: TJX

Record Date: 04/15/2025Meeting Type: Annual

Primary Security ID: 872540109

Shares Voted: 5,892

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jose B. Alvarez	Mgmt	For	For	For
1b	Elect Director Alan M. Bennett	Mgmt	For	For	For
1c	Elect Director Rosemary T. Berkery	Mgmt	For	For	For
1d	Elect Director David T. Ching	Mgmt	For	For	For
1e	Elect Director C. Kim Goodwin	Mgmt	For	For	For
1f	Elect Director Ernie Herrman	Mgmt	For	For	For
1g	Elect Director Amy B. Lane	Mgmt	For	For	For
1h	Elect Director Carol Meyrowitz	Mgmt	For	For	For
1i	Elect Director Jackwyn L. Nemerov	Mgmt	For	For	For

The TJX Companies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1j	Elect Director Charles F. Wagner, Jr.	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Caterpillar, Inc.

Meeting Date: 06/11/2025	Country: USA	Ticker: CAT
Record Date: 04/14/2025	Meeting Type: Annual	
Primary Security ID: 149123101		

Shares Voted: 2,515

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Joseph E. Creed	Mgmt	For	For	For
1.2	Elect Director James C. Fish, Jr.	Mgmt	For	For	For
1.3	Elect Director Gerald Johnson	Mgmt	For	For	For
1.4	Elect Director Nazzic S. Keene	Mgmt	For	For	For
1.5	Elect Director David W. MacLennan	Mgmt	For	For	For
1.6	Elect Director Judith F. Marks	Mgmt	For	For	For
1.7	Elect Director Debra L. Reed-Klages	Mgmt	For	For	For
1.8	Elect Director Susan C. Schwab	Mgmt	For	For	For
1.9	Elect Director D. James Umpleby, III	Mgmt	For	For	For
1.10	Elect Director Rayford Wilkins, Jr.	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on a Civil Rights Audit	SH	Against	Against	Against
5	Report on Religious Discrimination in Charitable Contributions	SH	Against	Against	Against
6	Consider Abolishing DEI Policies, Departments, and Goals	SH	Against	Against	Against

## Chipotle Mexican Grill, Inc.

Meeting Date: 06/11/2025

Country: USA

Ticker: CMG

Record Date: 04/15/2025

Meeting Type: Annual

Primary Security ID: 169656105

Shares Voted: 7,082

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Albert Baldocchi	Mgmt	For	For	For
1b	Elect Director Scott Boatwright	Mgmt	For	For	For
1c	Elect Director Matthew Carey	Mgmt	For	For	For
1d	Elect Director Patricia Fili-Krushel	Mgmt	For	For	For
1e	Elect Director Laura Fuentes	Mgmt	For	For	For
1f	Elect Director Mauricio Gutierrez	Mgmt	For	For	For
1g	Elect Director Robin Hickenlooper	Mgmt	For	For	For
1h	Elect Director Scott Maw	Mgmt	For	For	For
1i	Elect Director Mary Winston	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against

## Corpay, Inc.

Meeting Date: 06/11/2025

Country: USA

Ticker: CPAY

Record Date: 04/16/2025

Meeting Type: Annual

Primary Security ID: 219948106

Shares Voted: 333

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Annabelle Bexiga	Mgmt	For	For	For
1b	Elect Director Ronald F. Clarke	Mgmt	For	For	For
1c	Elect Director Joseph W. Farrelly	Mgmt	For	For	For
1d	Elect Director Rahul Gupta	Mgmt	For	For	For
1e	Elect Director Thomas M. Hagerty	Mgmt	For	For	For
1f	Elect Director Archie L. Jones, Jr.	Mgmt	For	For	For

Corpay, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Richard Macchia	Mgmt	For	For	For
1h	Elect Director Hala G. Modellmog	Mgmt	For	For	For
1i	Elect Director Jeffrey S. Sloan	Mgmt	For	For	For
1j	Elect Director Steven T. Stull	Mgmt	For	For	For
1k	Elect Director Gerald C. Throop	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Require Independent Board Chair	SH	Against	For	For

Fidelity National Financial, Inc.

Meeting Date: 06/11/2025

Record Date: 04/14/2025

Primary Security ID: 31620R303

Country: USA

Meeting Type: Annual

Ticker: FNF

Shares Voted: 1,342					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Halim Dhanidina	Mgmt	For	For	For
1.2	Elect Director Daniel D. (Ron) Lane	Mgmt	For	For	For
1.3	Elect Director Cary H. Thompson	Mgmt	For	For	For
2	Change State of Incorporation from Delaware to Nevada	Mgmt	For	Against	Against
3	Declassify the Board of Directors	SH	None	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Freeport-McMoRan Inc.

Meeting Date: 06/11/2025

Record Date: 04/14/2025

Primary Security ID: 35671D857

Country: USA

Meeting Type: Annual

Ticker: FCX



Freeport-McMoRan Inc.

Shares Voted: 7,512

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director David P. Abney	Mgmt	For	For	For
1.2	Elect Director Richard C. Adkerson	Mgmt	For	For	For
1.3	Elect Director Marcela E. Donadio	Mgmt	For	For	For
1.4	Elect Director Robert W. Dudley	Mgmt	For	For	For
1.5	Elect Director Hugh Grant	Mgmt	For	For	For
1.6	Elect Director Lydia H. Kennard	Mgmt	For	For	For
1.7	Elect Director Ryan M. Lance	Mgmt	For	For	For
1.8	Elect Director Sara Grootwassink Lewis	Mgmt	For	For	For
1.9	Elect Director Dustan E. McCoy	Mgmt	For	For	For
1.10	Elect Director Kathleen L. Quirk	Mgmt	For	For	For
1.11	Elect Director John J. Stephens	Mgmt	For	For	For
1.12	Elect Director Frances Fragos Townsend	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Nasdaq, Inc.

Meeting Date: 06/11/2025Country: USATicker: NDAQ

Record Date: 04/14/2025Meeting Type: Annual

Primary Security ID: 631103108

Shares Voted: 2,117

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Melissa M. Arnoldi	Mgmt	For	For	For
1b	Elect Director Charlene T. Begley	Mgmt	For	For	For
1c	Elect Director Adena T. Friedman	Mgmt	For	For	For
1d	Elect Director Essa Kazim	Mgmt	For	For	For
1e	Elect Director Thomas A. Kloet	Mgmt	For	For	For

Nasdaq, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Kathryn A. Koch	Mgmt	For	For	For
1g	Elect Director Holden Spaht	Mgmt	For	For	For
1h	Elect Director Michael R. Splinter	Mgmt	For	For	For
1i	Elect Director Johan Torgeby	Mgmt	For	For	For
1j	Elect Director Toni Townes-Whitley	Mgmt	For	For	For
1k	Elect Director Jeffery W. Yabuki	Mgmt	For	For	For
1l	Elect Director Alfred W. Zollar	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	For	For

Pure Storage, Inc.

Meeting Date: 06/11/2025Country: USATicker: PSTG

Record Date: 04/17/2025Meeting Type: Annual

Primary Security ID: 74624M102

Shares Voted: 100					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Scott Dietzen	Mgmt	For	Withhold	Withhold
1.2	Elect Director Charles Giancarlo	Mgmt	For	Withhold	Withhold
1.3	Elect Director John Murphy	Mgmt	For	Withhold	Withhold
1.4	Elect Director Greg Tomb	Mgmt	For	Withhold	Withhold
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Rocket Companies, Inc.

Meeting Date: 06/11/2025Country: USATicker: RKT

Record Date: 05/20/2025Meeting Type: Annual

Primary Security ID: 77311W101

Shares Voted: 538

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Dan Gilbert	Mgmt	For	Withhold	Withhold
1.2	Elect Director Alastair (Alex) Rampell	Mgmt	For	Withhold	Withhold
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Target Corporation

Meeting Date: 06/11/2025Country: USATicker: TGT

Record Date: 04/14/2025Meeting Type: Annual

Primary Security ID: 87612E106

Shares Voted: 2,376

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David P. Abney	Mgmt	For	For	For
1b	Elect Director Douglas M. Baker, Jr.	Mgmt	For	For	For
1c	Elect Director George S. Barrett	Mgmt	For	For	For
1d	Elect Director Gail K. Boudreaux	Mgmt	For	For	For
1e	Elect Director Brian C. Cornell	Mgmt	For	For	For
1f	Elect Director Robert L. Edwards	Mgmt	For	For	For
1g	Elect Director Donald R. Knauss	Mgmt	For	For	For
1h	Elect Director Christine A. Leahy	Mgmt	For	For	For
1i	Elect Director Monica C. Lozano	Mgmt	For	For	For
1j	Elect Director Grace Puma	Mgmt	For	For	For
1k	Elect Director Derica W. Rice	Mgmt	For	For	For
1l	Elect Director Dmitri L. Stockton	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Discrimination Risks of Affirmative Action Initiatives	SH	Against	Against	Against

Ulta Beauty, Inc.

Meeting Date: 06/11/2025

Record Date: 04/14/2025

Primary Security ID: 903845303

Country: USA

Meeting Type: Annual

Ticker: ULTA

Shares Voted: 217

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michelle L. Collins	Mgmt	For	For	For
1b	Elect Director Kelly E. Garcia	Mgmt	For	For	For
1c	Elect Director Catherine A. Halligan	Mgmt	For	For	For
1d	Elect Director Patricia A. Little	Mgmt	For	For	For
1e	Elect Director George R. Mrkonic	Mgmt	For	For	For
1f	Elect Director Lorna E. Nagler	Mgmt	For	For	For
1g	Elect Director Heidi G. Petz	Mgmt	For	For	For
1h	Elect Director Gisel Ruiz	Mgmt	For	For	For
1i	Elect Director Michael C. Smith	Mgmt	For	For	For
1j	Elect Director Kecia L. Steelman	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

W. R. Berkley Corporation

Meeting Date: 06/11/2025

Record Date: 04/17/2025

Primary Security ID: 084423102

Country: USA

Meeting Type: Annual

Ticker: WRB

Shares Voted: 1,606

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ronald E. Blaylock	Mgmt	For	For	For
1b	Elect Director Mary C. Farrell	Mgmt	For	For	For
1c	Elect Director Marie A. Mattson	Mgmt	For	For	For
1d	Elect Director Robert A. Rusbuldt	Mgmt	For	For	For
2	Increase Authorized Common Stock	Mgmt	For	For	For

W. R. Berkley Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
5	Adopt Director Resignation Guideline	SH	Against	Against	Against

Williams-Sonoma, Inc.

Meeting Date: 06/11/2025Country: USATicker: WSM

Record Date: 04/14/2025Meeting Type: Annual

Primary Security ID: 969904101

Shares Voted: 608					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Laura Alber	Mgmt	For	For	For
1.2	Elect Director Esi Eggleston Bracey	Mgmt	For	For	For
1.3	Elect Director Andrew Champion	Mgmt	For	For	For
1.4	Elect Director Scott Dahnke	Mgmt	For	For	For
1.5	Elect Director Anne Finucane	Mgmt	For	For	For
1.6	Elect Director Arianna Huffington	Mgmt	For	For	For
1.7	Elect Director William Ready	Mgmt	For	For	For
1.8	Elect Director Frits van Paasschen	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Exact Sciences Corporation

Meeting Date: 06/12/2025Country: USATicker: EXAS

Record Date: 04/15/2025Meeting Type: Annual

Primary Security ID: 30063P105

Shares Voted: 14					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael Barber	Mgmt	For	For	For

Exact Sciences Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Paul Clancy	Mgmt	For	For	For
1c	Elect Director Daniel J. Levangie	Mgmt	For	For	For
1d	Elect Director Kevin Conroy	Mgmt	For	For	For
1e	Elect Director Shacey Petrovic	Mgmt	For	For	For
1f	Elect Director Kimberly Popovits	Mgmt	For	For	For
1g	Elect Director Katherine S. Zanotti	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against

Fidelity National Information Services, Inc.

Meeting Date: 06/12/2025	Country: USA	Ticker: FIS
Record Date: 04/14/2025	Meeting Type: Annual	
Primary Security ID: 31620M106		

Shares Voted: 2,810

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicole M. Anasenes	Mgmt	For	For	For
1b	Elect Director Mark D. Benjamin	Mgmt	For	For	For
1c	Elect Director Stephanie L. Ferris	Mgmt	For	For	For
1d	Elect Director Kourtney K. Gibson	Mgmt	For	For	For
1e	Elect Director Jeffrey A. Goldstein	Mgmt	For	For	For
1f	Elect Director Lisa A. Hook	Mgmt	For	For	For
1g	Elect Director Kenneth T. Lamneck	Mgmt	For	For	For
1h	Elect Director Gary L. Lauer	Mgmt	For	For	For

Fidelity National Information Services, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director James B. Stallings, Jr.	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Ingersoll Rand Inc.

Meeting Date: 06/12/2025

Record Date: 04/17/2025

Primary Security ID: 45687V106

Country: USA

Meeting Type: Annual

Ticker: IR

Shares Voted: 2,084

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vicente Reynal	Mgmt	For	For	For
1b	Elect Director William P. Donnelly	Mgmt	For	For	For
1c	Elect Director Jennifer Hartsock	Mgmt	For	For	For
1d	Elect Director John Humphrey	Mgmt	For	For	For
1e	Elect Director Marc E. Jones	Mgmt	For	For	For
1f	Elect Director JoAnna L. Sohovich	Mgmt	For	For	For
1g	Elect Director Mark P. Stevenson	Mgmt	For	For	For
1h	Elect Director Michelle Swanenburg	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Monolithic Power Systems, Inc.

Meeting Date: 06/12/2025

Record Date: 04/16/2025

Primary Security ID: 609839105

Country: USA

Meeting Type: Annual

Ticker: MPWR

Shares Voted: 232

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Herbert Chang	Mgmt	For	For	For

Monolithic Power Systems, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Director Michael Hsing	Mgmt	For	For	For
1.3	Elect Director Carintia Martinez	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Declassify the Board of Directors	Mgmt	For	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For

Monster Beverage Corporation

Meeting Date: 06/12/2025Country: USATicker: MNST

Record Date: 04/21/2025Meeting Type: Annual

Primary Security ID: 61174X109

Shares Voted: 3,630

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney C. Sacks	Mgmt	For	For	For
1b	Elect Director Hilton H. Schlosberg	Mgmt	For	For	For
1c	Elect Director Mark J. Hall	Mgmt	For	For	For
1d	Elect Director Ana Demel	Mgmt	For	For	For
1e	Elect Director James L. Dinkins	Mgmt	For	For	For
1f	Elect Director William "Bill" W. Douglas, III	Mgmt	For	For	For
1g	Elect Director Tiffany M. Hall	Mgmt	For	For	For
1h	Elect Director Jeanne P. Jackson	Mgmt	For	For	For
1i	Elect Director Steven G. Pizula	Mgmt	For	For	For
1j	Elect Director Mark S. Vidergauz	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For



W. P. Carey Inc.

Meeting Date: 06/12/2025

Record Date: 03/24/2025

Primary Security ID: 92936U109

Country: USA

Meeting Type: Annual

Ticker: WPC

Shares Voted: 1,096

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Alexander	Mgmt	For	For	For
1b	Elect Director Constantin H. Beier	Mgmt	For	For	For
1c	Elect Director Tonit M. Calaway	Mgmt	For	For	For
1d	Elect Director Peter J. Farrell	Mgmt	For	For	For
1e	Elect Director Robert J. Flanagan	Mgmt	For	For	For
1f	Elect Director Jason E. Fox	Mgmt	For	For	For
1g	Elect Director Rhonda O. Gass	Mgmt	For	For	For
1h	Elect Director Margaret G. Lewis	Mgmt	For	For	For
1i	Elect Director Christopher J. Niehaus	Mgmt	For	For	For
1j	Elect Director Elisabeth T. Stheeman	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

Zoom Communications, Inc.

Meeting Date: 06/12/2025

Record Date: 04/14/2025

Primary Security ID: 98980L101

Country: USA

Meeting Type: Annual

Ticker: ZM

Shares Voted: 1,339

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director William R. McDermott	Mgmt	For	For	For
1.2	Elect Director Michael Fenger	Mgmt	For	For	For
1.3	Elect Director Santiago Subotovsky	Mgmt	For	Withhold	Withhold
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Zoom Communications, Inc.

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

Best Buy Co., Inc.

Meeting Date: 06/13/2025

Record Date: 04/14/2025

Primary Security ID: 086516101

Country: USA

Meeting Type: Annual

Ticker: BBY

Shares Voted: 967

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Corie S. Barry	Mgmt	For	For	For
1b	Elect Director Lisa M. Caputo	Mgmt	For	For	For
1c	Elect Director David W. Kenny	Mgmt	For	For	For
1d	Elect Director David C. Kimbell	Mgmt	For	For	For
1e	Elect Director Mario J. Marte	Mgmt	For	For	For
1f	Elect Director Karen A. McLoughlin	Mgmt	For	For	For
1g	Elect Director Claudia F. Munce	Mgmt	For	For	For
1h	Elect Director Richelle P. Parham	Mgmt	For	For	For
1i	Elect Director Steven E. Rendle	Mgmt	For	For	For
1j	Elect Director Sima D. Sistani	Mgmt	For	For	For
1k	Elect Director Melinda D. Whittington	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Provide Right to Act by Written Consent	SH	Against	Against	Against
6	Consider Ending Participation in Human Rights Campaign Corporate Equality Index	SH	Against	Against	Against
7	Report on LGBTQIA+ Inclusion Efforts	SH	Against	Against	Against
8	Publish Climate Transition Plan	SH	Against	Against	Against

Fortinet, Inc.

Meeting Date: 06/13/2025

Record Date: 04/21/2025

Primary Security ID: 34959E109

Country: USA

Meeting Type: Annual

Ticker: FTNT

Shares Voted: 3,236

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ken Xie	Mgmt	For	For	For
1.2	Elect Director Michael Xie	Mgmt	For	For	For
1.3	Elect Director Kenneth A. Goldman	Mgmt	For	For	For
1.4	Elect Director Ming Hsieh	Mgmt	For	For	For
1.5	Elect Director Jean Hu	Mgmt	For	For	For
1.6	Elect Director Janet Napolitano	Mgmt	For	For	For
1.7	Elect Director William H. Neukom	Mgmt	For	For	For
1.8	Elect Director Judith Sim	Mgmt	For	For	For
1.9	Elect Director James Stavridis	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For

Marvell Technology, Inc.

Meeting Date: 06/13/2025

Record Date: 04/17/2025

Primary Security ID: 573874104

Country: USA

Meeting Type: Annual

Ticker: MRVL

Shares Voted: 4,521

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sara Andrews	Mgmt	For	For	For
1b	Elect Director W. Tudor Brown	Mgmt	For	For	For
1c	Elect Director Brad W. Buss	Mgmt	For	For	For
1d	Elect Director Daniel Durn	Mgmt	For	For	For
1e	Elect Director Rebecca W. House	Mgmt	For	For	For
1f	Elect Director Marachel L. Knight	Mgmt	For	For	For

Marvell Technology, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Matthew J. Murphy	Mgmt	For	For	For
1h	Elect Director Richard P. Wallace	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	For	For

Regeneron Pharmaceuticals, Inc.

Meeting Date: 06/13/2025	Country: USA	Ticker: REGN
Record Date: 04/15/2025	Meeting Type: Annual	
Primary Security ID: 75886F107		

Shares Voted: 536

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Bonnie L. Bassler	Mgmt	For	Against	Against
1b	Elect Director Michael S. Brown	Mgmt	For	Against	Against
1c	Elect Director Leonard S. Schleifer	Mgmt	For	For	For
1d	Elect Director George D. Yancopoulos	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Declassify the Board of Directors	Mgmt	For	For	For
5a	Eliminate Supermajority Vote Requirements of Section 2(e) (8) of Article VI of Incorporation	Mgmt	For	For	For
5b	Eliminate Supermajority Vote Requirements of Article VI of Incorporation	Mgmt	For	For	For

Biogen Inc.

Meeting Date: 06/17/2025	Country: USA	Ticker: BIIB
Record Date: 04/21/2025	Meeting Type: Annual	
Primary Security ID: 09062X103		

Biogen Inc.

Shares Voted: 758

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director: Caroline D. Dorsa	Mgmt	For	For	For
1b	Elect Director: Maria C. Freire	Mgmt	For	For	For
1c	Elect Director: William A. Hawkins	Mgmt	For	For	For
1d	Elect Director: Susan K. Langer	Mgmt	For	For	For
1e	Elect Director: Jesus B. Mantas	Mgmt	For	For	For
1f	Elect Director: Lloyd Minor	Mgmt	For	For	For
1g	Elect Director: Menelas Pangalos	Mgmt	For	For	For
1h	Elect Director: Monish Patolawala	Mgmt	For	For	For
1i	Elect Director: Eric K. Rowinsky	Mgmt	For	For	For
1j	Elect Director: Stephen A. Sherwin	Mgmt	For	For	For
1k	Elect Director: Christopher A. Viehbach	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Block, Inc.

Meeting Date: 06/17/2025Country: USATicker: XYZ

Record Date: 04/21/2025Meeting Type: Annual

Primary Security ID: 852234103

Shares Voted: 2,943

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Jack Dorsey	Mgmt	For	For	For
1.2	Elect Director Paul Deighton	Mgmt	For	For	For
1.3	Elect Director Neha Narula	Mgmt	For	Withhold	Withhold
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	Against	Against

Block, Inc.

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

MetLife, Inc.

Meeting Date: 06/17/2025	Country: USA	Ticker: MET
Record Date: 04/21/2025	Meeting Type: Annual	
Primary Security ID: 59156R108		

Shares Voted: 3,052					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carlos M. Gutierrez	Mgmt	For	For	For
1b	Elect Director Carla A. Harris	Mgmt	For	For	For
1c	Elect Director Laura J. Hay	Mgmt	For	For	For
1d	Elect Director R. Glenn Hubbard	Mgmt	For	For	For
1e	Elect Director Jeh C. Johnson	Mgmt	For	For	For
1f	Elect Director William E. Kennard	Mgmt	For	For	For
1g	Elect Director Michel A. Khalaf	Mgmt	For	For	For
1h	Elect Director Diana L. McKenzie	Mgmt	For	For	For
1i	Elect Director Denise M. Morrison	Mgmt	For	For	For
1j	Elect Director Christian Mumenthaler	Mgmt	For	For	For
1k	Elect Director Mark A. Weinberger	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Synchrony Financial

Meeting Date: 06/17/2025	Country: USA	Ticker: SYF
Record Date: 04/22/2025	Meeting Type: Annual	
Primary Security ID: 87165B103		

Shares Voted: 2,014

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Brian D. Doubles	Mgmt	For	For	For
1b	Elect Director Fernando Aguirre	Mgmt	For	For	For
1c	Elect Director Paget L. Alves	Mgmt	For	For	For
1d	Elect Director Kamila Chytil	Mgmt	For	For	For
1e	Elect Director Daniel Colao	Mgmt	For	For	For
1f	Elect Director Arthur W. Coviello, Jr.	Mgmt	For	For	For
1g	Elect Director Roy A. Guthrie	Mgmt	For	For	For
1h	Elect Director Jeffrey G. Naylor	Mgmt	For	For	For
1i	Elect Director P.W. "Bill" Parker	Mgmt	For	For	For
1j	Elect Director Laurel J. Richie	Mgmt	For	For	For
1k	Elect Director Ellen M. Zane	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Trimble Inc.

Meeting Date: 06/17/2025Country: USATicker: TRMB

Record Date: 04/21/2025Meeting Type: Annual

Primary Security ID: 896239100

Shares Voted: 1,267

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director James C. Dalton	Mgmt	For	For	For
1.2	Elect Director Borje Ekholm	Mgmt	For	For	For
1.3	Elect Director Kaigham (Ken) Gabriel	Mgmt	For	For	For
1.4	Elect Director Meaghan Lloyd	Mgmt	For	For	For
1.5	Elect Director Ronald S. Nersesian	Mgmt	For	For	For
1.6	Elect Director Robert G. Painter	Mgmt	For	For	For
1.7	Elect Director Mark S. Peek	Mgmt	For	For	For
1.8	Elect Director Kara Sprague	Mgmt	For	For	For
1.9	Elect Director Thomas Sweet	Mgmt	For	For	For

Trimble Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Johan Wibergh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Autodesk, Inc.

**Meeting Date:** 06/18/2025

**Country:** USA

**Ticker:** ADSK

**Record Date:** 04/22/2025

**Meeting Type:** Annual

**Primary Security ID:** 052769106

Shares Voted: 1,137

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Andrew Anagnost	Mgmt	For	For	For
1b	Elect Director Karen Blasing	Mgmt	For	For	For
1c	Elect Director John T. Cahill	Mgmt	For	For	For
1d	Elect Director Reid French	Mgmt	For	For	For
1e	Elect Director Ayanna Howard	Mgmt	For	For	For
1f	Elect Director Blake Irving	Mgmt	For	For	For
1g	Elect Director Ram R. Krishnan	Mgmt	For	For	For
1h	Elect Director Stephen Milligan	Mgmt	For	For	For
1i	Elect Director Rami Rahim	Mgmt	For	For	For
1j	Elect Director Stacy J. Smith	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For

Coinbase Global, Inc.

**Meeting Date:** 06/18/2025

**Country:** USA

**Ticker:** COIN

**Record Date:** 04/21/2025

**Meeting Type:** Annual

**Primary Security ID:** 19260Q107



Shares Voted: 1,068

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Brian Armstrong	Mgmt	For	Withhold	Withhold
1.2	Elect Director Marc L. Andreessen	Mgmt	For	Withhold	Withhold
1.3	Elect Director Paul Clement	Mgmt	For	For	For
1.4	Elect Director Christa Davies	Mgmt	For	For	For
1.5	Elect Director Frederick Ernest Ehrsam, III	Mgmt	For	Withhold	Withhold
1.6	Elect Director Kelly A. Kramer	Mgmt	For	For	For
1.7	Elect Director Chis Lehane	Mgmt	For	For	For
1.8	Elect Director Tobias Lütke	Mgmt	For	For	For
1.9	Elect Director Gokul Rajaram	Mgmt	For	Withhold	Withhold
1.10	Elect Director Fred Wilson	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Comcast Corporation

Meeting Date: 06/18/2025Country: USATicker: CMCSA  
Record Date: 04/08/2025Meeting Type: Annual  
Primary Security ID: 20030N101

Shares Voted: 19,228

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kenneth J. Bacon	Mgmt	For	Withhold	Withhold
1.2	Elect Director Thomas J. Baltimore, Jr.	Mgmt	For	For	For
1.3	Elect Director Madeline S. Bell	Mgmt	For	Withhold	Withhold
1.4	Elect Director Louise F. Brady	Mgmt	For	For	For
1.5	Elect Director Edward D. Breen	Mgmt	For	For	For
1.6	Elect Director Jeffrey A. Honickman	Mgmt	For	Withhold	Withhold
1.7	Elect Director Wonya Y. Lucas	Mgmt	For	For	For
1.8	Elect Director Asuka Nakahara	Mgmt	For	For	For
1.9	Elect Director David C. Novak	Mgmt	For	For	For

## Comcast Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Brian L. Roberts	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Amend Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
5	Improve Executive Compensation Program and Policy	SH	Against	Against	Against
6	Require Independent Board Chair	SH	Against	For	For

## CrowdStrike Holdings, Inc.

Meeting Date: 06/18/2025

Country: USA

Ticker: CRWD

Record Date: 04/25/2025

Meeting Type: Annual

Primary Security ID: 22788C105

Shares Voted: 1,216

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cary J. Davis	Mgmt	For	Withhold	Withhold
1.2	Elect Director George Kurtz	Mgmt	For	For	For
1.3	Elect Director Laura J. Schumacher	Mgmt	For	Withhold	Withhold
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

## Keurig Dr Pepper Inc.

Meeting Date: 06/18/2025

Country: USA

Ticker: KDP

Record Date: 04/21/2025

Meeting Type: Annual

Primary Security ID: 49271V100

Shares Voted: 5,930

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Timothy "Tim" Cofer	Mgmt	For	For	For
1.2	Elect Director Robert "Bob" Gamgort	Mgmt	For	For	For
1.3	Elect Director Oray B. Boston Jr.	Mgmt	For	For	For

Keurig Dr Pepper Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Juliette Hickman	Mgmt	For	For	For
1.5	Elect Director Pamela "Pam" Patsley	Mgmt	For	For	For
1.6	Elect Director Debra Sandler	Mgmt	For	For	For
1.7	Elect Director Robert "Bob" Singer	Mgmt	For	For	For
1.8	Elect Director Mike Van de Ven	Mgmt	For	For	For
1.9	Elect Director Lawson Whiting	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Veeva Systems Inc.

Meeting Date: 06/18/2025Country: USATicker: VEEV

Record Date: 04/21/2025Meeting Type: Annual

Primary Security ID: 922475108

Shares Voted: 783					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Tim Cabral	Mgmt	For	For	For
1b	Elect Director Mark Carges	Mgmt	For	Against	Against
1c	Elect Director Peter P. Gassner	Mgmt	For	For	For
1d	Elect Director Mary Lynne Hedley	Mgmt	For	For	For
1e	Elect Director Priscilla Hung	Mgmt	For	For	For
1f	Elect Director Marshall L. Mohr	Mgmt	For	For	For
1g	Elect Director Gordon Ritter	Mgmt	For	Against	Against
1h	Elect Director Paul Sekhri	Mgmt	For	For	For
1i	Elect Director Matthew J. Wallach	Mgmt	For	Against	Against
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Vertiv Holdings Co.

Meeting Date: 06/18/2025Country: USATicker: VRT

Record Date: 04/21/2025Meeting Type: Annual

Primary Security ID: 92537N108

Vertiv Holdings Co.

Shares Voted: 1,798

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David M. Cote	Mgmt	For	For	For
1b	Elect Director Giordano Albertazzi	Mgmt	For	For	For
1c	Elect Director Joseph J. DeAngelo	Mgmt	For	For	For
1d	Elect Director Joseph van Dokkum	Mgmt	For	Withhold	Withhold
1e	Elect Director Roger Fradin	Mgmt	For	For	For
1f	Elect Director Jakki L. Haussler	Mgmt	For	For	For
1g	Elect Director Jacob Kotzubei	Mgmt	For	Withhold	Withhold
1h	Elect Director Matthew Louie	Mgmt	For	For	For
1i	Elect Director Edward L. Monser	Mgmt	For	For	For
1j	Elect Director Steven S. Reinemund	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Delta Air Lines, Inc.

Meeting Date: 06/19/2025Country: USATicker: DAL

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

Primary Security ID: 247361702

Shares Voted: 3,393

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Edward H. Bastian	Mgmt	For	For	For
1b	Elect Director Christophe Beck	Mgmt	For	For	For
1c	Elect Director Maria Black	Mgmt	For	For	For
1d	Elect Director Willie CW Chiang	Mgmt	For	For	For
1e	Elect Director Greg Creed	Mgmt	For	For	For
1f	Elect Director David G. DeWalt	Mgmt	For	For	For
1g	Elect Director Leslie D. Hale	Mgmt	For	For	For
1h	Elect Director Christopher A. Hazleton	Mgmt	For	For	For

Delta Air Lines, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Michael P. Huerta	Mgmt	For	For	For
1j	Elect Director Judith J. McKenna	Mgmt	For	For	For
1k	Elect Director Vasant M. Prabhu	Mgmt	For	For	For
1l	Elect Director Sergio A. L. Rial	Mgmt	For	For	For
1m	Elect Director David S. Taylor	Mgmt	For	For	For
1n	Elect Director Kathy N. Waller	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Provide Right to Act by Written Consent	SH	Against	For	For

Dollar Tree, Inc.

Meeting Date: 06/19/2025

Record Date: 04/17/2025

Primary Security ID: 256746108

Country: USA

Meeting Type: Annual

Ticker: DLTR

Shares Voted: 1,021

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael C. Creedon, Jr.	Mgmt	For	For	For
1b	Elect Director William W. Douglas, III	Mgmt	For	For	For
1c	Elect Director Cheryl W. Grise	Mgmt	For	For	For
1d	Elect Director Daniel J. Heinrich	Mgmt	For	For	For
1e	Elect Director Paul C. Hilal	Mgmt	For	For	For
1f	Elect Director Timothy A. Johnson	Mgmt	For	For	For
1g	Elect Director Edward J. Kelly, III	Mgmt	For	For	For
1h	Elect Director Jeffrey G. Naylor	Mgmt	For	For	For
1i	Elect Director Diane E. Randolph	Mgmt	For	For	For
1j	Elect Director Bertram L. Scott	Mgmt	For	For	For

Dollar Tree, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Stephanie P. Stahl	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For

DoorDash, Inc.

Meeting Date: 06/24/2025	Country: USA	Ticker: DASH
Record Date: 04/25/2025	Meeting Type: Annual	
Primary Security ID: 25809K105		

Shares Voted: 1,734

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jeffrey Blackburn	Mgmt	For	For	For
1b	Elect Director L. John Doerr	Mgmt	For	Against	Against
1c	Elect Director Andy Fang	Mgmt	For	Against	Against
1d	Elect Director Diego Piacentini	Mgmt	For	Against	Against
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Reflect Certain Delaware Law Provisions Regarding Officer Exculpation	Mgmt	For	Against	Against

Mastercard Incorporated

Meeting Date: 06/24/2025	Country: USA	Ticker: MA
Record Date: 04/25/2025	Meeting Type: Annual	
Primary Security ID: 57636Q104		

Shares Voted: 4,319

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Merit E. Janow	Mgmt	For	For	For
1b	Elect Director Candido Bracher	Mgmt	For	For	For
1c	Elect Director Richard K. Davis	Mgmt	For	For	For

Mastercard Incorporated

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

eBay Inc.

Meeting Date: 06/25/2025

Record Date: 04/28/2025

Primary Security ID: 278642103

Country: USA

Meeting Type: Annual

Ticker: EBAY

Shares Voted: 2,533

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Adriane M. Brown	Mgmt	For	For	For
1b	Elect Director Aparna Chennapragada	Mgmt	For	For	For
1c	Elect Director Logan D. Green	Mgmt	For	For	For
1d	Elect Director E. Carol Hayles	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Jamie J. Iannone	Mgmt	For	For	For
1f	Elect Director Shripriya Mahesh	Mgmt	For	For	For
1g	Elect Director William D. Nash	Mgmt	For	For	For
1h	Elect Director Paul S. Pressler	Mgmt	For	For	For
1i	Elect Director Zane Rowe	Mgmt	For	For	For
1j	Elect Director Mohak Shroff	Mgmt	For	For	For
1k	Elect Director Perry M. Traquina	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting to 10%	SH	Against	For	For
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against

NVIDIA Corporation

Meeting Date: 06/25/2025Country: USATicker: NVDA

Record Date: 04/28/2025Meeting Type: Annual

Primary Security ID: 67066G104

Shares Voted: 124,465

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Robert K. Burgess	Mgmt	For	For	For
1b	Elect Director Tench Coxo	Mgmt	For	For	For
1c	Elect Director John O. Dabiri	Mgmt	For	For	For
1d	Elect Director Persis S. Drell	Mgmt	For	For	For
1e	Elect Director Jen-Hsun Huang	Mgmt	For	For	For
1f	Elect Director Dawn Hudson	Mgmt	For	For	For
1g	Elect Director Harvey C. Jones	Mgmt	For	For	For
1h	Elect Director Melissa B. Lora	Mgmt	For	For	For
1i	Elect Director Stephen C. Neal	Mgmt	For	For	For
1j	Elect Director Ellen Ochoa	Mgmt	For	For	For



NVIDIA Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director A. Brooke Seawell	Mgmt	For	For	For
1l	Elect Director Aarti Shah	Mgmt	For	For	For
1m	Elect Director Mark A. Stevens	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Eliminate Supermajority Vote Requirements	Mgmt	For	For	For
5	Amend Right to Call Special Meeting	SH	Against	Against	Against
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against
7	Enhance Workforce Data Reporting	SH	Against	Against	Against

CoStar Group, Inc.

Meeting Date: 06/26/2025Country: USATicker: CSGP

Record Date: 04/28/2025Meeting Type: Annual

Primary Security ID: 22160N109

Shares Voted: 2,156

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Louise S. Sams	Mgmt	For	For	For
1b	Elect Director Andrew C. Florance	Mgmt	For	For	For
1c	Elect Director John L. Berisford	Mgmt	For	For	For
1d	Elect Director Angelique G. Brunner	Mgmt	For	For	For
1e	Elect Director Rachel C. Glaser	Mgmt	For	For	For
1f	Elect Director John W. Hill	Mgmt	For	For	For
1g	Elect Director Christine M. McCarthy	Mgmt	For	For	For
1h	Elect Director Robert W. Musslewhite	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

CoStar Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Report on Political Contributions	SH	Against	For	For

Dell Technologies Inc.

Meeting Date: 06/26/2025	Country: USA	Ticker: DELL
Record Date: 04/30/2025	Meeting Type: Annual	
Primary Security ID: 24703L202		

Shares Voted: 8					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Michael S. Dell	Mgmt	For	Withhold	Withhold
1.2	Elect Director David W. Dorman	Mgmt	For	Withhold	Withhold
1.3	Elect Director Egon Durban	Mgmt	For	For	For
1.4	Elect Director David Grain	Mgmt	For	For	For
1.5	Elect Director William D. Green	Mgmt	For	For	For
1.6	Elect Director Ellen J. Kullman	Mgmt	For	Withhold	Withhold
1.7	Elect Director Steven M. Mollenkopf	Mgmt	For	For	For
1.8	Elect Director Lynn Vojvodich Radakovich	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

Equity Residential

Meeting Date: 06/26/2025	Country: USA	Ticker: EQR
Record Date: 03/31/2025	Meeting Type: Annual	
Primary Security ID: 29476L107		

Shares Voted: 1,680					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Angela M. Aman	Mgmt	For	For	For
1b	Elect Director Linda Walker Bynoe	Mgmt	For	For	For
1c	Elect Director Mary Kay Haben	Mgmt	For	For	For

Equity Residential

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Ann C. Hoff	Mgmt	For	For	For
1e	Elect Director Tahsinul Zia Huque	Mgmt	For	For	For
1f	Elect Director Nina P. Jones	Mgmt	For	For	For
1g	Elect Director David J. Neithercut	Mgmt	For	For	For
1h	Elect Director Mark J. Parrell	Mgmt	For	For	For
1i	Elect Director Mark S. Shapiro	Mgmt	For	For	For
1j	Elect Director Stephen E. Sterrett	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For

The Kroger Co.

Meeting Date: 06/26/2025	Country: USA	Ticker: KR
Record Date: 04/28/2025	Meeting Type: Annual	
Primary Security ID: 501044101		

Shares Voted: 3,514

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nora A. Aufreiter	Mgmt	For	For	For
1b	Elect Director Kevin M. Brown	Mgmt	For	For	For
1c	Elect Director Elaine L. Chao	Mgmt	For	For	For
1d	Elect Director Anne Gates	Mgmt	For	For	For
1e	Elect Director Karen M. Hoguet	Mgmt	For	For	For
1f	Elect Director Clyde R. Moore	Mgmt	For	For	For
1g	Elect Director Ronald L. Sargent	Mgmt	For	For	For
1h	Elect Director J. Amanda Sourry Knox (Amanda Sourry)	Mgmt	For	For	For
1i	Elect Director Mark S. Sutton	Mgmt	For	For	For
1j	Elect Director Ashok Vemuri	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For

The Kroger Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Educating Customers on Tobacco Waste	SH	Against	Against	Against
5	Report on Implementing Worker-Driven Social Responsibility Principles	SH	Against	Against	Against
6	Report on Risks Related to Fulfilling Information Requests for Enforcing Laws Criminalizing Reproductive or Gender-affirming Health Care	SH	Against	Against	Against

ANSYS, Inc.

Meeting Date: 06/27/2025

Record Date: 04/28/2025

Primary Security ID: 03662Q105

Country: USA

Meeting Type: Annual

Ticker: ANSS

Shares Voted: 462					
Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Claire Bramley	Mgmt	For	For	For
1B	Elect Director Anil Chakravarthy	Mgmt	For	For	For
1C	Elect Director Jim Frankola	Mgmt	For	For	For
1D	Elect Director Alec Gallimore	Mgmt	For	For	For
1E	Elect Director Ronald Hovsepian	Mgmt	For	For	For
1F	Elect Director Barbara Scherer	Mgmt	For	For	For
1G	Elect Director Ravi Vijayaraghavan	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Provide Right to Act by Written Consent	SH	Against	For	For

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: 1,005

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Lester B. Knight	Mgmt	For	For	For
1.2	Elect Director Gregory C. Case	Mgmt	For	For	For
1.3	Elect Director Jose Antonio Alvarez	Mgmt	For	For	For
1.4	Elect Director Jin-Yong Cai	Mgmt	For	For	For
1.5	Elect Director Jeffrey C. Campbell	Mgmt	For	For	For
1.6	Elect Director Cheryl A. Francis	Mgmt	For	For	For
1.7	Elect Director Adriana Karaboutis	Mgmt	For	For	For
1.8	Elect Director Richard C. Notebaert	Mgmt	For	For	For
1.9	Elect Director Gloria Santona	Mgmt	For	For	For
1.10	Elect Director Sarah E. Smith	Mgmt	For	For	For
1.11	Elect Director Byron O. Spruell	Mgmt	For	For	For
1.12	Elect Director James G. Stavridis	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Ratify Ernst & Young Chartered Accountants as Statutory Auditor	Mgmt	For	For	For
5	Authorize the Audit Committee to Fix Remuneration of Auditors	Mgmt	For	For	For
6	Authorise Issue of Equity	Mgmt	For	For	For
7	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
8	Amend Omnibus Stock Plan	Mgmt	For	For	For

Meeting Date: 06/30/2025

Record Date: 05/01/2025

Primary Security ID: 60937P106

Country: USA

Meeting Type: Annual

Ticker: MDB

Shares Voted: 374

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Francisco D'Souza	Mgmt	For	For	For
1.2	Elect Director Charles M. Hazard, Jr.	Mgmt	For	Withhold	Withhold
1.3	Elect Director Tom Killalea	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For