



For each of us, investing may have a different meaning. Some may invest to build a legacy for their children, to create wealth for retirement security, for charitable giving, or to make a difference in the world.

But translating these individual goals into decisions within the context of complex, ever-changing financial markets can be a challenge. At the same time, there are serious challenges facing our society that financial advisors play a critical role in helping solve, from the widespread lack of retirement savings to intractable social challenges where impact investing can make a difference. No matter why you invest, we at ThirtyNorth believe that your investment decisions are an expression of your beliefs and values – it's a part of the legacy you leave behind.

That is why at ThirtyNorth Investments our commitment is to work with our clients to bring together money and meaning. With a focus on personalized strategy and independent thinking, we are dedicated to building trust through collaboration. We listen to understand because we know meeting financial goals ultimately means something much more than money – it is inextricably linked with each client's goals for their life, their family, and their legacy.

And when clients succeed, we succeed: our firm's goals are aligned with those of our clients. ThirtyNorth Investments is independent and employee-owned, allowing us to provide objective advice unencumbered by outside incentives. We employ a team-based approach for client service that taps into the team's collective knowledge, experience and perspective. The ThirtyNorth promise has always been the same: a comprehensive approach with consistent execution.

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## WOMEN IMPACT STRATEGY

ThirtyNorth Investments' newest offering is the Women Impact Strategy, a carefully crafted portfolio of fifty companies that are leaders in gender representation as well as financial performance. The Women Impact Strategy offers investors a potential first-movers advantage and is intended to leverage positive social impact to enhance portfolio returns. ThirtyNorth believes gender diversity in corporate leadership and on boards isn't just the right thing to do — it is also the financially smart thing to do.

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