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Crossmark's Large Cap Core Growth Strategy

Awarded PSN Top Guns Designation

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There is a unique place for investors. Where innovation and values intersect. Where investing with conviction doesn't equal compromising returns. Where investments are selected with purpose. We call this place Crossmark.

Investors, Advisors, and Values Based-Investing

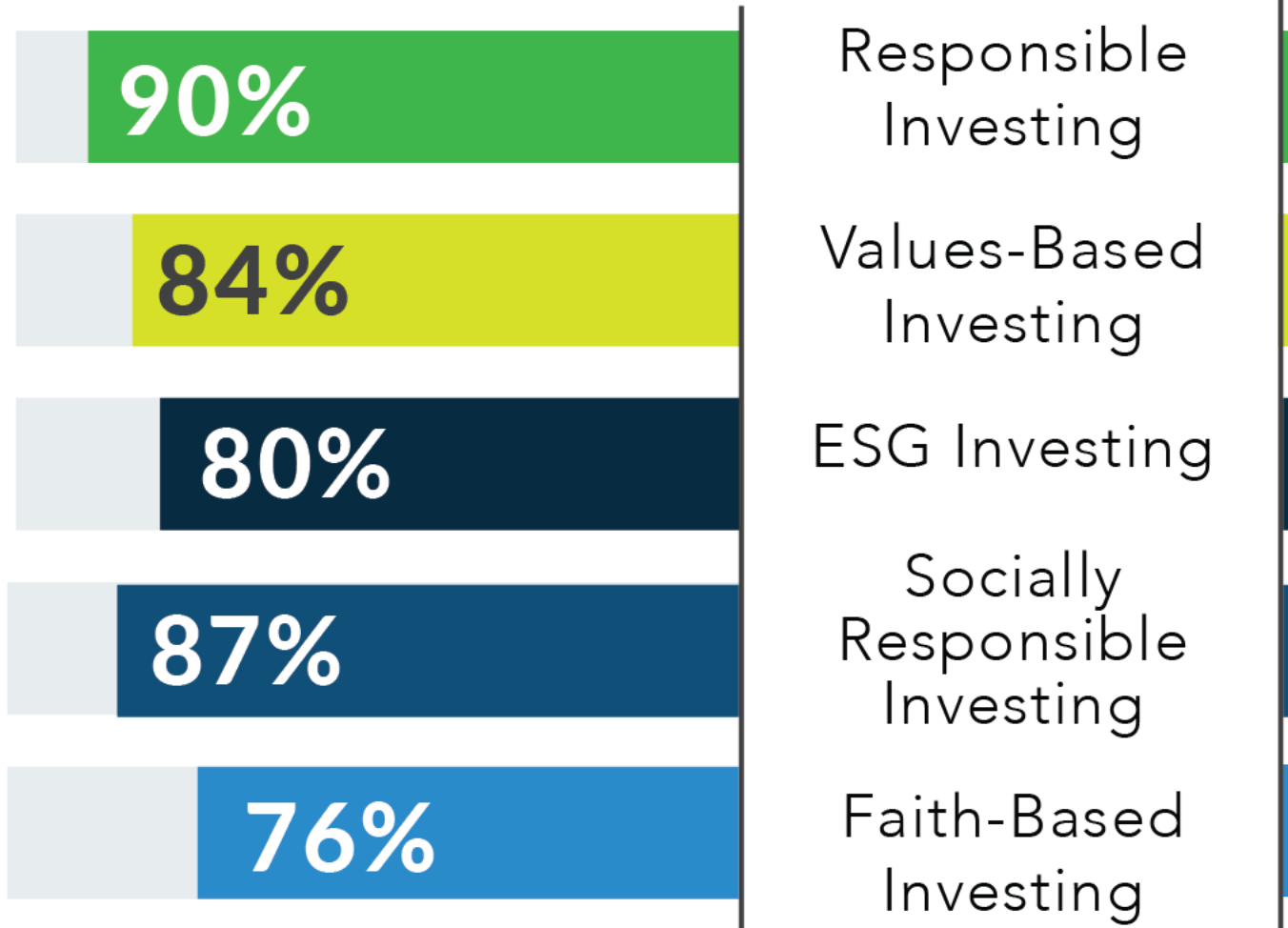
We conducted a nation-wide survey of mass affluent investors to understand their familiarity and preferences around different types of values-based investments.¹

The Untapped Market

There is a strong correlation between age and familiarity with terms such as values-based, responsible, and ESG investing. This large gap could be leaving a \$33.8 trillion dollar market on the table.²

How familiar are investors following types of inv

Millennials





THE HIGHEST RANKED VALUES ACROSS INVESTORS

Healthy living

1

Faith or Religion

2

Carbon-reducing

3

Diversity/inclusion

4

Reducing climate change

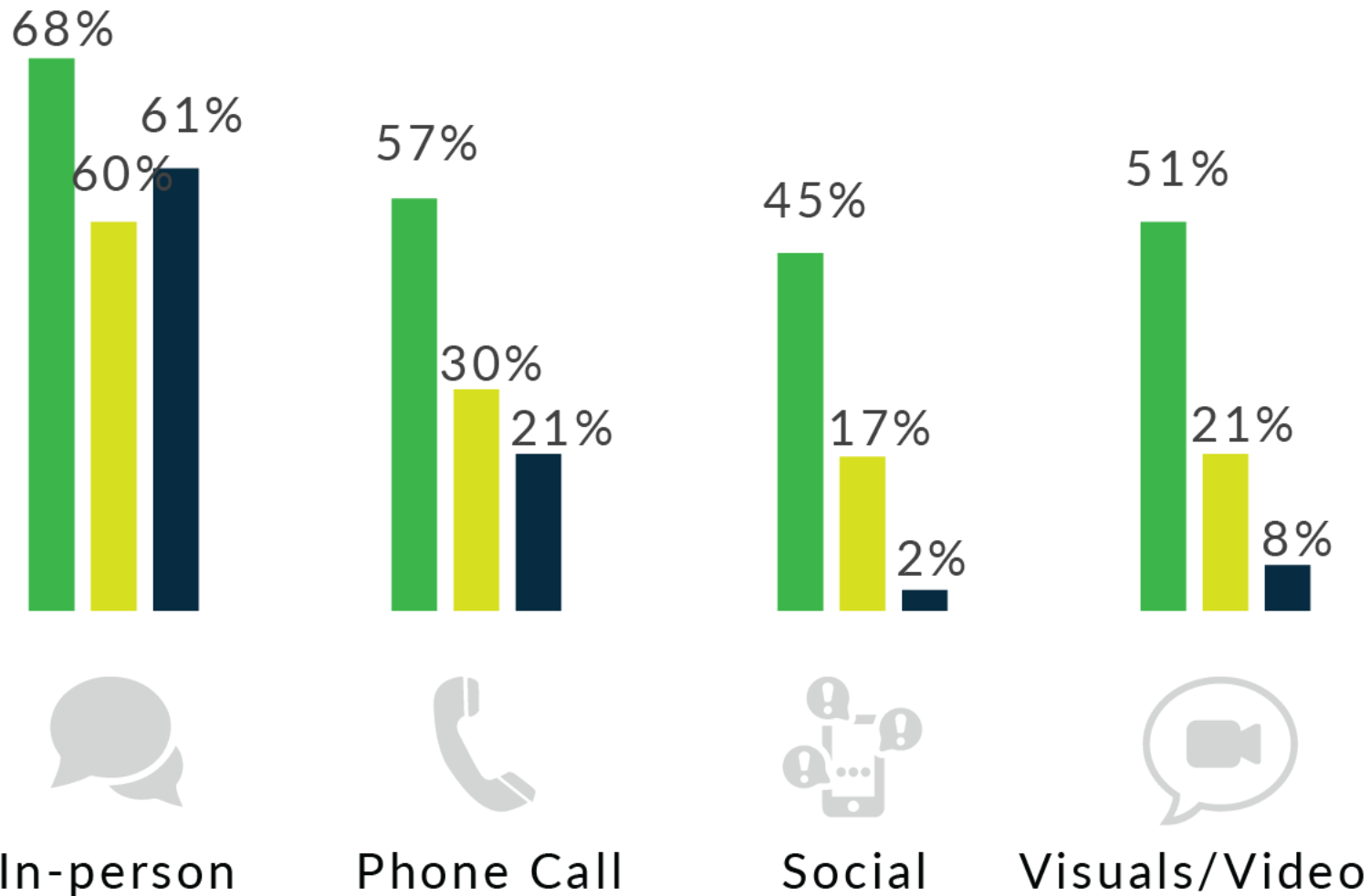
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How do Investors Prefer to be Educated on Values-Based Investing?

The conversations you have with your clients are important, and can help unlock the right investment strategy.

How do Investors Prefer to be Educated

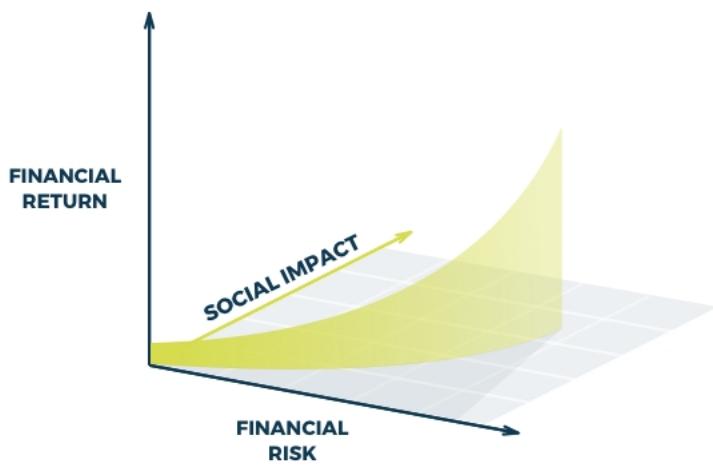
Values-Based Investments



1. The study was facilitated by a third-party organization, Praxis Research Partners, in which we surveyed a total of 488 with invested assets of at least \$250,000.
2. The future of wealth in the United States. Deloitte Center for Financial Services, 2015. If senior investors continue to control 53% of the total investable assets (as reflected in the Deloitte study), then they have the potential to own an estimated \$33.8T in investible assets by 2030.

The intersection of values and Investments

Each client has different priorities and values that affect how they invest. We help investors align their values with a broad spectrum of expanding investment solutions.



OUR VALUES

Invest without Compromise

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Invest With Purpose

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