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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

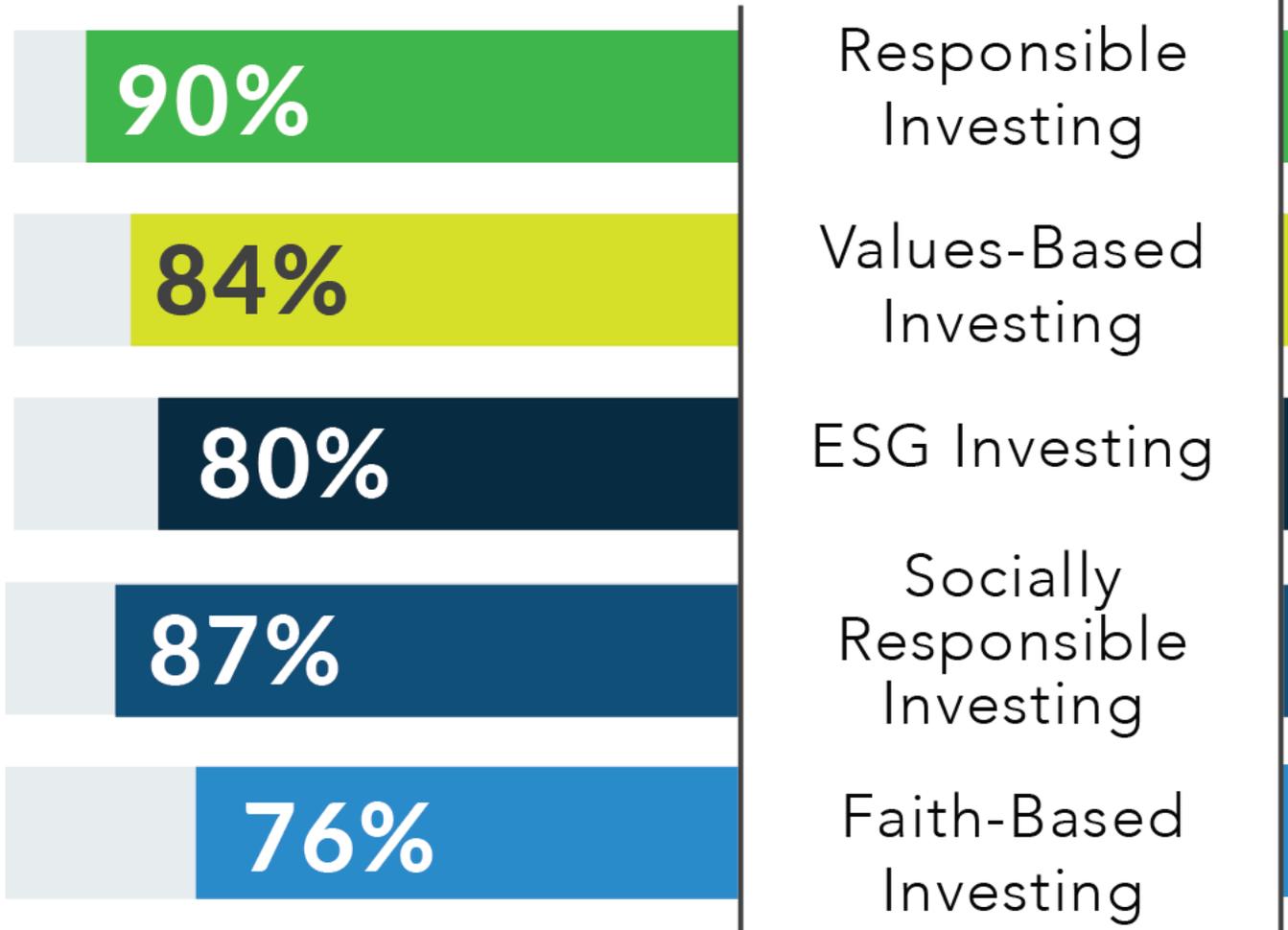
We conducted a nation-wide survey of mass affluent investors to understand their familiarity and preferences around different types of values-based investments.<sup>1</sup>

#### 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.<sup>2</sup>

# 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

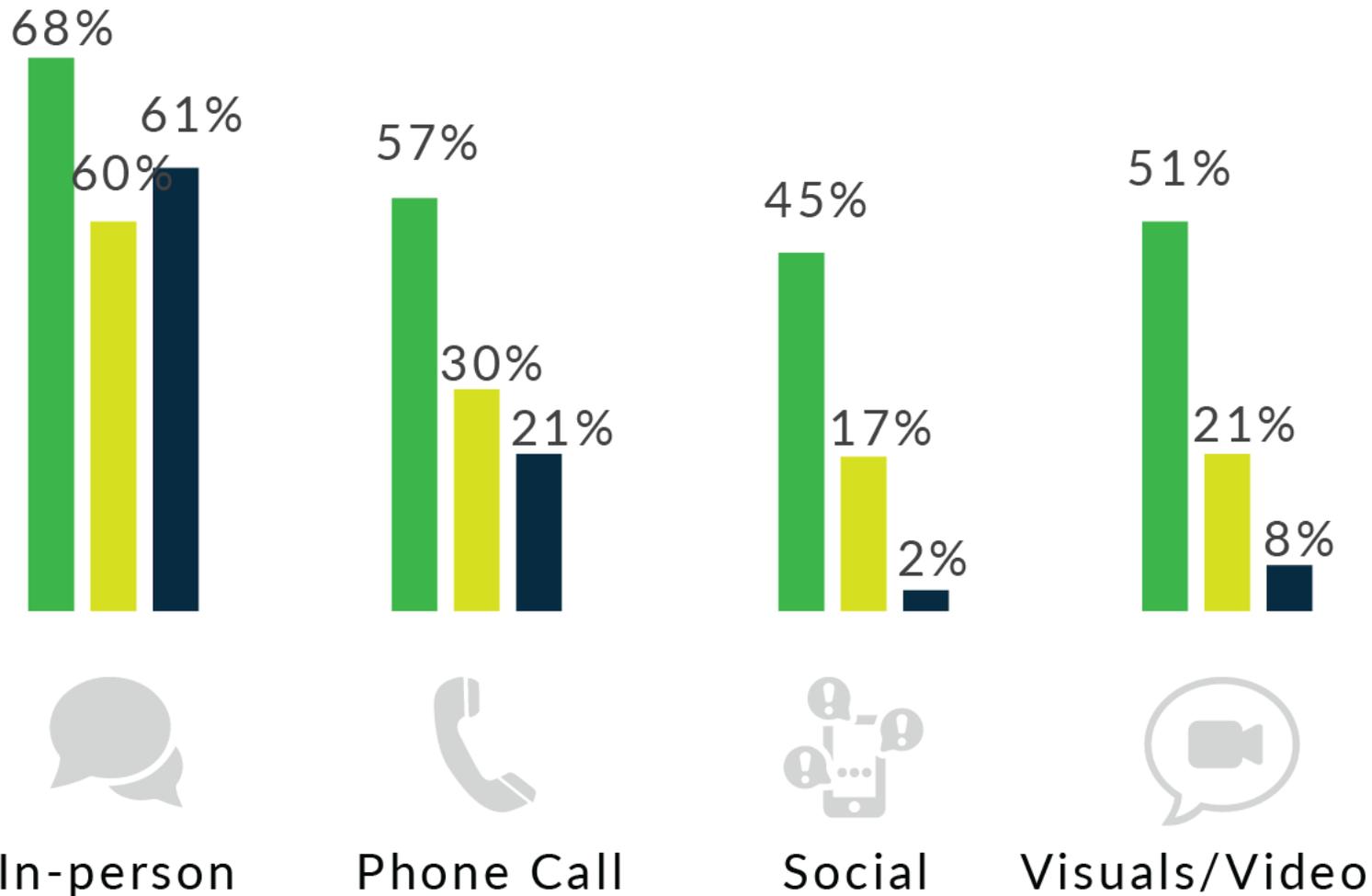
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## How do Investors Prefer to be Educated on Values-Based Investing?

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

# How do Investors Prefer to be Educated

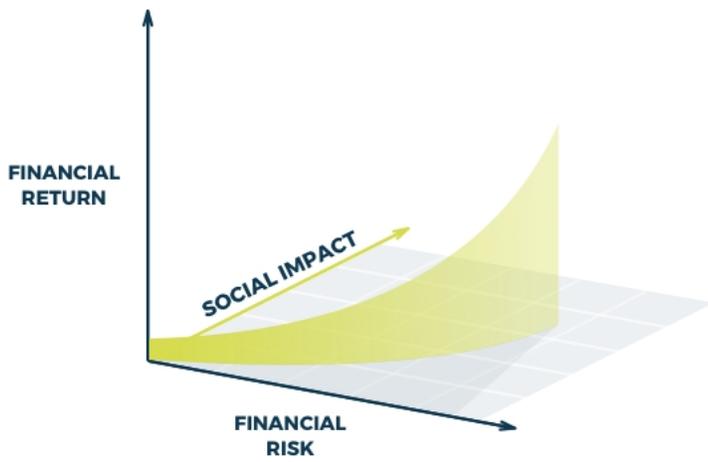
## Values-Based Investments



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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