

Please let us know what's important to you! First select the importance of each issue area—high, medium, low, or not a factor. Then choose which orientation reflects your priorities for each individual issue in that area.

NAME:

DATE:

EXCLUSIONS

Do not consider companies with involvement in the following areas:

- Abortion**
manufacture of abortifacients or provision of abortion services
- Animal Testing**
perform animal testing in the development of pharmaceutical or non-pharmaceutical products
- Gambling**
operation of casinos, racetracks or other gaming parlors, online gaming sites or the manufacture of equipment
- Weapons**
any revenues from nuclear or conventional weapons contracts
- Adult Entertainment**
production or distribution of sexually explicit publications, motion pictures, television, websites, software or video games, or offering sexually explicit services
- Contraceptives**
manufacture of contraceptives
- Nuclear Power**
nuclear power generation or resale
- Alcohol**
manufacture or wholesale distribution of alcohol products or marketing them under their own brand names
- Embryonic Stem Cell Research**
embryonic stem cell or fetal tissue research
- Tobacco**
manufacture or wholesale distribution of tobacco products

Adult Entertainment

Adult Entertainment ratings evaluate involvement in the production or provision of sexually explicit or violent content, including print, video, video games, websites, or live performances. Concerns about sexually explicit or pornographic content have long been a recurring element of values-based and socially responsible investing approaches. These concerns include the dehumanization or degradation of women through this type of content and the moral issues raised by exposure to or patronage of such sexually explicit materials. In recent years, concern has increased over the escalating level of violence in entertainment products such as video games, television programs, and motion pictures. Parents, social critics, cultural observers, and government officials all have decried this trend and have sought to regulate it through the implementation of media ratings systems. Companies involved in the provision of sexually explicit or violent content can find themselves subject to fines, litigation, or government regulation of their business activities. Investors seeking to minimize their exposure to such risks may wish to evaluate a company's involvement in the provision of Adult Entertainment products or services.

Importance of Adult Entertainment issues (check one):

- High
- Medium
- Low
- Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Adult media <i>The production or distribution of adult-oriented publications, motion pictures, or television productions. This includes NC-17 motion pictures, TV-MA rated television programs, unrated sexually explicit motion pictures, sexually explicit publications and the provision of sexually explicit videos to consumers via satellite, cable, or rental.</i>	are involved in adult media	are not involved in adult media	not a factor
Sexually explicit Internet operations <i>The operation or production of sexually explicit websites (including pod casts) or hosting services for sexually explicit websites.</i>	are involved in sexually explicit Internet operations	are not involved in sexually explicit Internet operations	not a factor
Adult software or video games <i>The production of software or video games rated as Mature or Adults Only by the Entertainment Software Ratings Board.</i>	are involved in adult software or video games	are not involved in adult software or video games	not a factor
Sexually explicit live performance <i>The operation of clubs restricted to adults (as defined by local or state ordinance) that provide sexually explicit or nude live entertainment or the operation of live phone sex services.</i>	are involved in sexually explicit live performance	are not involved in sexually explicit live performance	not a factor

Alcohol

Alcohol ratings evaluate involvement in the manufacture and distribution of alcohol, both wholesale and retail. Screening of alcohol companies from an investment portfolio is a traditional values-based and socially responsible investing approach. These investors are concerned with the societal impact of alcohol consumption, including health, driving safety, and domestic violence issues. Other investors may be concerned about the investment risk of companies involved in the beverage alcohol industry. Legislative and liability issues are a concern for this industry, and investors seeking to avoid these specific risks may wish to avoid the industry altogether. Some investors, however, look at the potential investment return, as well as the varying levels of exposure within a company's overall business model, and determine that the rewards outweigh the risks.

Importance of Alcohol issues (check one):

- High
- Medium
- Low
- Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Alcohol manufacturing or branding <i>The production of alcohol products (beverage and other consumable alcohol), companies who sell or market these products under their own brand name, and companies who have licensed their brand or name for use in the marketing of these products.</i>	are involved in alcohol manufacturing or branding	are not involved in alcohol manufacturing or branding	not a factor
Alcohol wholesale distribution <i>The business-to-business sale and distribution of alcohol products (beverage or other consumable alcohol) as wholesale products. Companies that manufacture these products are not included.</i>	are involved in alcohol wholesale distribution	are not involved in alcohol wholesale distribution	not a factor
Alcohol revenue - manufacture/wholesale distribution <i>Revenue from the manufacture, branding, or business-to-business distribution of alcohol products in the most recent fiscal year.</i>	derive more revenue from alcohol	derive less revenue from alcohol	not a factor
Alcohol revenue percentage - manufacture/wholesale distribution <i>The percentage of revenue derived from the manufacture, branding, or business-to-business distribution of alcohol in the most recent fiscal year.</i>	derive a higher percentage of revenue from alcohol	derive a lower percentage of revenue from alcohol	not a factor
Alcohol retail sales <i>The retail sale of alcohol products (beverage or other consumable alcohol).</i>	are involved in retail alcohol sales	are not involved in retail alcohol sales	not a factor

Animal Testing

Animal Testing ratings evaluate practices regarding the use of animals in the testing of products. In the United States, development and/or testing of products often requires the use of live animal testing. Regulatory agencies mandate such testing to protect consumers by ensuring safety of the products in question, particularly in the pharmaceutical and healthcare industry. The list of required testing often includes prescription medications, surgical devices, and new medical procedures. In addition, agencies require testing to determine carcinogenic properties of chemicals and to determine hazardous chemical interactions. Opponents of animal testing argue that many tests go beyond regulatory mandated testing. Other opponents disagree with the practice altogether, citing cruelty. Proponents of animal testing argue that even testing beyond that required protects consumers.

Importance of Animal Testing issues (check one):

- High
- Medium
- Low
- Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
USDA's testing list <i>Companies the United States Department of Agriculture (USDA) has determined operate a research facility or facilities engaged in commercial pharmaceutical or non-pharmaceutical product testing involving live animals.</i>	are on USDA's testing list	are not on USDA's testing list	not a factor
PETA's testing list <i>Companies the People for the Ethical Treatment of Animals (PETA) has determined conduct non-required animal testing.</i>	are on PETA's testing list	are not on PETA's testing list	not a factor
Pharmaceutical testing <i>Companies that conduct live animal testing (as identified by USDA or PETA) as part of the development of pharmaceutical products.</i>	are involved in pharmaceutical testing	are not involved in pharmaceutical testing	not a factor

CONTINUED

Animal Testing CONTINUED

Issue	Your Preference (circle one) Favor companies if they...		
Non-pharmaceutical testing <i>Companies that conduct live animal testing (as identified by USDA or PETA) as part of the development of non-pharmaceutical products.</i>	are involved in non-pharmaceutical testing	are not involved in non-pharmaceutical testing	not a factor
Official testing policy <i>Whether or not companies engaged in animal testing have established and published on their corporate website an official policy regarding the use and treatment of animals.</i>	have a testing policy	do not have a testing policy	not a factor

Bioethics

Bioethics ratings evaluate involvement in the use of biotechnology such as stem cell research. Opponents of activities such as stem cell research raise strong moral arguments against using embryonic or fetal tissue cells in such research programs. Opponents base objections on the sanctity of life that begins at conception or concerns about the future ethical quagmire that might result from precedents set by such research. Federal regulations limit the use of federal funds for such research; private funding of these programs faces no such limitations or restrictions. Proponents of this type of research point to the possibility of life-saving treatments for conditions including Alzheimer's disease, Parkinson's disease, and diabetes. Proponents also argue that the embryos, originally created for fertility processes, are destined to be destroyed. For investors, the possible risks associated with a company's involvement in this type of high-profile activity include possible legislative restrictions, consumer backlash, or shareholder activism. The possible benefits to investors include the economic windfall of blockbuster pharmaceutical or therapeutic treatments.

Importance of Bioethics issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Adult, umbilical or placenta stem cell research <i>Research involving human stem cells derived from adult cells, umbilical cord blood stem cells, and/or placenta stem cells, either directly or through proxy arrangements.</i>	are involved in adult, umbilical or placenta stem cell research	are not involved in adult, umbilical or placenta stem cell research	not a factor
Embryonic stem cell or fetal tissue research <i>Research involving human embryonic stem cells and/or fetal tissue, either directly or through proxy arrangements.</i>	are involved in embryonic stem cell or fetal tissue research	are not involved in embryonic stem cell or fetal tissue research	not a factor

Diversity

Diversity ratings evaluate corporate approaches to racial and gender diversity. Proponents of using this category for evaluating companies argue that diversity increases the perspectives contributing to business decisions within the company. New perspectives can provide insight into potential market segments important to the company as well as different ways of approaching company challenges. Opponents of using diversity to evaluate companies may argue that it encourages companies to adopt policies verging on race or gender-based quota systems.

Importance of Diversity issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Board number of minorities <i>The number of minorities on companies' boards.</i>	have a higher number of minorities	have a lower number of minorities	not a factor
Board percentage of minorities <i>The percentage of minorities on companies' boards.</i>	have a higher percentage of minorities	have a lower percentage of minorities	not a factor
Board number of women <i>The number of women on companies' boards.</i>	have a higher number of women	have a lower number of women	not a factor
Board percentage of women <i>The percentage of women on companies' boards.</i>	have a higher percentage of women	have a lower percentage of women	not a factor

Environment

Environmental ratings evaluate certain aspects of corporate environmental performance and potential liability based on U.S. government data sources. Sources include: the Environmental Protection Agency's (EPA) Toxic Release Inventory for toxic chemical use, release, and transfer information; the Emergency Response Notification System, for chemical and oil spills; EPA's penalty and compliance information for fines; and EPA's database of Potentially Responsible Parties for Superfund cleanup responsibilities. For investors interested in sustainability issues, the environment is one of the three pillars of sustainability. (Social and economic issues are typically cited as the other two pillars, including by the Global Reporting Initiative, a sustainability reporting standard.) Proponents of the concept argue that sustainability is the process of meeting today's needs while not decreasing the ability of future generations to meet their needs. Evaluation of data in this category can contribute to an overall sustainability evaluation of a company. Controversies sometimes exist over the health, safety, or convenience of consumers compared to certain environmental issues. Such controversies could include extra tamper-proof packaging on over-the-counter medications (arguably wasteful of resources), or the decision to remain with coal to reduce the likelihood of a nuclear accident, or in certain circumstances, policies to flush into wastewater federally controlled pharmaceutical substances to keep them out of recirculation and away from potential abusers. In addition, different environmental issues sometimes come into conflict with one another. The nuclear versus coal debate is an example of this. Nuclear power reduced toxic emissions as well as carbon dioxide emissions while having a host of its own environmental issues. In such instances, tradeoffs take place as companies determine how to manage their environmental impacts and responsibilities to other stakeholders.

Importance of Environment issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Superfund sites <i>The number of National Priority List (NPL) Superfund sites at which a company has been identified as a Potentially Responsible Party (PRP).</i>	are potentially responsible for more Superfund sites	are potentially responsible for fewer Superfund sites	not a factor
Superfund sites per revenue <i>The number of National Priority List (NPL) Superfund sites per billion dollars of revenue at which the company has been identified as a Potentially Responsible Party (PRP).</i>	are potentially responsible for more Superfund sites per revenue	are potentially responsible for fewer Superfund sites per revenue	not a factor
Toxic emissions <i>The total pounds of toxic chemical releases.</i>	release more toxic emissions	release fewer toxic emissions	not a factor
Toxic emissions per revenue <i>The total pounds of toxic chemical releases per million dollars of revenue.</i>	release more toxic emissions per revenue	release fewer toxic emissions per revenue	not a factor
Toxic emissions trend <i>The 4-year trend in toxic chemical releases. The trend is calculated as a percent change in the rolling average over the 4 years.</i>	have an increasing toxic emissions trend	have a decreasing toxic emissions trend	not a factor
Toxic production waste <i>The toxic chemical production waste of a company by aggregating the total pounds of toxic chemicals released, treated, transferred, or impounded.</i>	generate more toxic production waste	generate less toxic production waste	not a factor
Toxic production waste per revenue <i>The toxic chemical production waste of a company by aggregating the total pounds of toxic chemicals released, treated, transferred, or impounded per million dollars of revenue.</i>	generate more toxic production waste per revenue	generate less toxic production waste per revenue	not a factor
Toxic production waste trend <i>The 4-year trend in toxic chemical production waste (the aggregate of toxic chemicals releases, treated, transferred, or impounded). The trend is calculated as a percent change in the rolling average over the 4 years.</i>	have an increasing toxic production waste trend	have a decreasing toxic production waste trend	not a factor
Chemical or oil spills <i>The number of incidents of spills for which a company is responsible in excess of 10,000 pounds of chemicals or 10,000 gallons of oil.</i>	are responsible for more chemical or oil spills	are responsible for less chemical or oil spills	not a factor
Chemical or oil spills per revenue <i>The number of incidents of spills for which a company is responsible per billion dollars of company revenue. Spills are only included if in excess of 10,000 pounds of chemicals or 10,000 gallons of oil.</i>	are responsible for more chemical or oil spills per revenue	are responsible for less chemical or oil spills per revenue	not a factor
Chemical or oil spills trend <i>The 3-year trend in chemical and oil spills. The trend is calculated as a percent change in the rolling average over the 3 years. The trend is within the number of incidents of spills for which a company is responsible in excess of 10,000 pounds of chemicals or 10,000 gallons of oil.</i>	have an increasing chemical or oil spills trend	have a decreasing chemical or oil spills trend	not a factor

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Environment CONTINUED

Issue	Your Preference (circle one) Favor companies if they...		
Environmental fines <i>The dollar value of fines paid by a company for violation of environmental statutes.</i>	paid higher environmental fines	paid lower environmental fines	not a factor
Environmental fines per revenue <i>These ratings evaluate the dollar value of fines paid by a company per million dollars of revenue for violation of environmental statutes.</i>	paid higher environmental fines per revenue	paid lower environmental fines per revenue	not a factor
Environmental fines trend <i>The 3-year trend in federal environmental fines. The trend is calculated as a percent change in the rolling average over the 3 years.</i>	have an increasing environmental fines trend	have a decreasing environmental fines trend	not a factor

Firearms

Firearms ratings evaluate involvement in the production of firearms or small arms ammunition for the non-military market. Proponents of gun control may seek to screen firearms manufacturers from their investment portfolios based on concerns over violent crime and child safety. Proponents of the right to bear arms oppose gun control and often argue the solution to violent crime and the ultimate safety of children comes through firearm ownership. In addition, hunting and sport shooting enthusiasts fear that gun control will curtail their activities. Investors seeking to minimize exposure to firms subject to legislative restriction or to possible class-action litigation may wish to evaluate a company's involvement in the production of firearms or small arms ammunition.

Importance of Firearms issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Firearms or ammunition manufacturing <i>The manufacture of firearms or small arms ammunition for non-military markets.</i>	are involved in firearms or ammunition manufacturing	are not involved in firearms or ammunition manufacturing	not a factor

Gambling

Gambling ratings evaluate involvement in the ownership and/or operation of casinos, pari-mutuel wagering facilities, online gaming services, or manufacture of equipment for use in gaming. Screening of gaming companies from an investment portfolio is a traditional values-based and socially responsible investing approach. These investors are concerned with the societal issues related to gambling that include criminal activity, domestic violence, personal bankruptcy, and suicide. Other investors consider gambling a legitimate form of entertainment and recreation.

Importance of Gambling issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Gambling operations <i>The ownership or operation of casinos, gaming parlors, racetracks (animal or machine) where pari-mutuel betting is permitted, and other types of gaming facilities or who are involved in the manufacture of gaming equipment for use in casinos, gaming parlors, or lottery operations.</i>	are involved in gambling	are not involved in gambling	not a factor
Gambling revenue <i>Revenue from the operation of gaming facilities (including online gaming), the manufacture or sale of gaming equipment, or other gaming-related services in the most recent fiscal year.</i>	derive more revenue from gambling	derive less revenue from gambling	not a factor

CONTINUED

Gambling CONTINUED

Issue	Your Preference (circle one) Favor companies if they...		
Gambling revenue percentage <i>The percentage of revenue derived from the operation of gaming facilities (including online gaming), the manufacture or sale of gaming equipment, or other gaming-related services in the most recent fiscal year.</i>	derive a higher percentage of revenue from gambling	derive a lower percentage of revenue from gambling	not a factor
Online gaming <i>The hosting or operation of online gaming services.</i>	are involved in online gaming	are not involved in online gaming	not a factor

Human Rights

Human Rights ratings evaluate company exposure and reaction to concerns about human rights conditions around the world. Advocates for human rights argue that the globalized economy and the size of many companies combine to make multi-national corporations primary actors in many troubling human rights situations. The countries in which a company operates are evaluated when considering a company's exposure to human rights issues. Operations in countries of concern raise the potential for human rights issues becoming a problem. In addition, certain international codes of conduct attempt to create voluntary initiatives to protect human rights (as well as other issues) where the potential for violations exist. Some may view human rights as a government-to-government issue and consider companies small players in resolving these issues. In addition, companies are providing jobs and income to people who might otherwise have neither. On this basis, some investors are inclined to avoid evaluation of companies' international exposure with regard to human rights.

Importance of Human Rights issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Ties to China <i>Ties (subsidiaries or branches) in the People's Republic of China, including Hong Kong.</i>	have ties to China	do not have ties to China	not a factor
Ties to oppressive regimes <i>Ties (subsidiaries or branches) to countries that Freedom House, a non-profit organization, identifies as "Not Free" based on its evaluation of political rights and civil liberties.</i>	have ties to oppressive regimes	do not have ties to oppressive regimes	not a factor
Maquiladora operations <i>The operation of maquiladoras in Mexico. Maquiladoras are primarily assembly plants for parts manufactured elsewhere and operate in a special tax and regulatory environment for the export of goods from Mexico.</i>	are involved in maquiladora operations	are not involved in maquiladora operations	not a factor
Global Sullivan Principles endorser <i>Endorsers of the Global Sullivan Principles. The principles include: support for universal human rights; equal opportunity for employees with respect to color, race, gender, age, ethnicity or religious beliefs; prohibition of child labor, physical punishment, female abuse, and involuntary servitude; respect for freedom of association; adequate compensation allowing employees to meet their basic needs; provision of safe and healthy workplaces, protection of the environment, and promotion of sustainable development; promotion of fair competition and refusal to offer, pay, or accept bribes; work to improve the quality of life of communities and provide training to disadvantaged peoples; promotion of the Principles to business partners.</i>	are an endorser	are a non-endorser	not a factor
UN Global Compact signatory <i>Signatories to the United Nations Global Compact. The Global Compact's ten principles include: respect the protection of human rights; confirm no complicity in human rights abuses; uphold the freedom of association and collective bargaining; eliminate forced and compulsory labor; abolish child labor; eliminate discrimination from employment and occupation; use precautionary approach to environmental issues; promote greater environmental responsibility; develop environmentally friendly technologies; work against all forms of corruption, including extortion and bribery.</i>	are a signatory	are a non-signatory	not a factor

Labor Relations

Labor Relations ratings evaluate relationships with organized labor based on unionization rates, strikes, and boycotts. Proponents of the union movement point to the contributions unions have made over time in protecting the health and welfare of major portions of the workforce. Many standards for work-life balance today were hard fought victories for unions, including the standard 8-hour workday. Opponents of the union movement point to a virtually forced political association for workers who may have differing political views than a particular union. In addition, union rules and negotiations with companies significantly reduce the flexibility of companies to address changing business environments.

Importance of Labor Relations issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
AFL-CIO boycott list <i>The American Federation of Labor-Congress of Industrial Organizations (AFL-CIO) "Do Not Buy" boycott list.</i>	are on boycott list	are not on boycott list	not a factor
Strikes or labor actions <i>Companies that have been subject to organized labor actions, including strikes, involving at least 100 employees and lasting at least 21 calendar days within the last 12 months.</i>	have been subject to significant organized labor action	have not been subject to significant organized labor action	not a factor
Unionization <i>The percentage of workforce that is unionized or represented by a collective bargaining agreement.</i>	have a higher percentage of their workforce unionized	have a lower percentage of their workforce unionized	not a factor

Life/Choice

Life/Choice ratings identify companies engaged in the manufacture, marketing, and/or licensing of abortifacient or contraceptive products. Abortion and contraception have been divisive and politically charged topics for at least the last six decades in the United States. Pro-Life activists argue that life begins at conception and must be protected. This position encompasses not only the abortion issue, but the contraceptive issue based on the specific approach to contraception. Pro-Choice activists argue that women should have the right to make reproductive choices based on sound medical advice with access to safe pharmaceuticals and procedures.

Importance of Life/Choice issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Abortifacient manufacturing <i>The manufacture of abortifacients, substances that are used to voluntarily terminate pregnancy.</i>	are involved in abortifacient manufacturing	are not involved in abortifacient manufacturing	not a factor
Emergency contraceptive manufacturing <i>The manufacture of emergency contraceptives, substances that are taken within 120 hours after intercourse to prevent unintended pregnancy.</i>	are involved in emergency contraceptive manufacturing	are not involved in emergency contraceptive manufacturing	not a factor
Non-emergency contraceptive manufacturing <i>The manufacture of non-emergency contraceptives including barrier, chemical, hormonal, or hybrid contraceptives. Non-emergency contraceptives are intended to be used in a preventive role prior to or immediately in conjunction with the act of intercourse.</i>	are involved in non-emergency contraceptive manufacturing	are not involved in non-emergency contraceptive manufacturing	not a factor
Contraceptives/abortifacient marketing <i>The marketing or licensing of abortifacient and/or contraceptive products manufactured by another company.</i>	are involved in contraceptive/abortifacient marketing	are not involved in contraceptive/abortifacient marketing	not a factor
Abortion services <i>These ratings identify companies that provide voluntary abortion services.</i>	are involved in abortion services	are not involved in abortion services	not a factor
Boycott of Planned Parenthood support <i>The Life Decisions International (LDI) Planned Parenthood contributions and support boycott.</i>	are on boycott list	are not on boycott list	not a factor

Military

Military ratings evaluate U.S. Department of Defense (DoD) prime contract awards to companies. DoD awards contracts for weapons systems, food, healthcare, building construction, and much more. Opponents of military spending argue that DoD's budget could be better spent elsewhere. Proponents argue it's an issue of national security; some suggest that DoD isn't spending enough. For investors seeking to avoid exposure to the military, the question they must ask is whether all contracts or only weapons-related contracts are relevant as a basis for evaluating companies in their portfolios.

Importance of Military issues (check one):

- High
- Medium
- Low
- Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
U.S. DoD contracting revenue <i>The total dollar value of all U.S. Department of Defense prime contract awards in the most recent government fiscal year for which data is available. All contracts, regardless of service or product, are included in these totals.</i>	derive more revenue from defense contracting	derive less revenue from defense contracting	not a factor
U.S. DoD contracting per revenue <i>The ratios of U.S. Department of Defense prime contract awards to company revenue in the most recent government fiscal year for which data is available. All contracts, regardless of service or product, are included in these totals.</i>	derive a higher ratio of revenue from defense contracting	derive a lower ratio of revenue from defense contracting	not a factor
Conventional weapons contracting revenue <i>The total dollar value of U.S. Department of Defense prime contract awards for conventional weapons in the most recent government fiscal year for which data is available. Weapons include lethal systems and their subcomponents.</i>	derive more revenue from conventional weapons contracting	derive less revenue from conventional weapons contracting	not a factor
Conventional weapons contracts per revenue <i>The ratios of U.S. Department of Defense prime contract awards for conventional weapons to company revenue in the most recent government fiscal year for which data is available. Weapons include lethal systems and their subcomponents.</i>	derive a higher ratio of revenue from conventional weapons contracting	derive a lower ratio of revenue from conventional weapons contracting	not a factor
Nuclear weapons contracting revenue <i>The total dollar value of U.S. Department of Defense prime contract awards for nuclear weapons in the most recent government fiscal year for which data is available.</i>	derive more revenue from nuclear weapons contracting	derive less revenue from nuclear weapons contracting	not a factor
Nuclear weapons contracts per revenue <i>The ratios of U.S. Department of Defense prime contract awards for nuclear weapons in the most recent government fiscal year for which data is available.</i>	derive a higher ratio of revenue from nuclear weapons contracting	derive a lower ratio of revenue from nuclear weapons contracting	not a factor
U.S. DoD Top 100 Contractors <i>The most recent ranking prepared by the U.S. Department of Defense of its Top 100 Contractors.</i>	are on list	are not on list	not a factor

Nuclear Power

Nuclear Power ratings identify involvement in the operation of nuclear power plants, companies having ownership in nuclear power plants, and companies involved in the resale of electricity derived from nuclear sources, as well as suppliers to the nuclear industry. Many people, including some environmentalists, are revisiting the nuclear power option because of current energy costs and a desire for alternatives to carbon-based fuels and their role in global warming/climate change. Critics of nuclear power continue to point to nuclear waste disposal as a long-term environmental issue and cost problem. In addition, critics point to the potential for accidents. In addition, proponents and opponents disagree on the appropriate cost accounting in determining the relative price of producing energy from nuclear powered plants compared with other sources.

Importance of Nuclear Power issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Nuclear power generation or sales <i>The ownership or operation of an active nuclear reactor or a nuclear reactor undergoing decommissioning. Companies that derive or purchase nuclear electricity for resale are also included.</i>	are involved in nuclear power generation or sales	are not involved in nuclear power generation or sales	not a factor
Nuclear electricity generated <i>The percentage of nuclear power generated or sold by electric utilities in the most recent fiscal year.</i>	generate a higher percentage of nuclear electricity	generate a lower percentage of nuclear electricity	not a factor
Nuclear related goods or services <i>The provision of goods or services primarily designed for the use of the nuclear power industry.</i>	are involved in nuclear related goods or services	are not involved in nuclear related goods or services	not a factor

Recognition

Recognition ratings evaluate recognition that companies receive from "top 100" and "top 10" type lists. Magazines and other groups often identify top company performers based on specific criteria that the particular magazine develops. These data elements tally the total number of such lists on which a company appears. Since each list has its own embedded methodology, exclusion from a specific list may not indicate poor performance of a company in a specific issue area. In addition, since the lists are so short, they represent only a small percentage of the companies on which other research is available. A pattern of recognition on such lists, however, may indicate a "consistent performer" within an issue area.

Importance of Recognition issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Diversity recognition <i>The number of magazines by which a company is recognized on racial and ethnic diversity topics. Magazine lists included in the evaluation are: DiversityInc's "Top 50 Companies for Diversity", DiversityBusiness.com's "Top 50 Businesses for Multicultural Business Opportunities", Hispanic magazine's "Corporate 100", LATINA Style magazine's "50 Best Companies for Latinas to Work", Hispanic Trends magazine's "Top 50 Corporations for Supplier Diversity", The Black Collegian magazine's "Top 100 Diversity Employers", Black Enterprise magazine's "30 Best for Diversity", Essence magazine's 35 Great Places to Work.</i>	are on more diversity recognition lists	are on fewer diversity recognition lists	not a factor
Workplace recognition <i>The number of magazines by which a company is recognized on workplace topics. Magazine lists included in the evaluation are: Fortune magazine's "100 Best Companies to Work For", Training magazine's "Training Top 100", Working Mother magazine's "100 Best Companies for Working Mothers".</i>	are on more workplace recognition lists	are on fewer workplace recognition lists	not a factor

Sexual Orientation

Sexual Orientation ratings evaluate policies related to gender identity and sexual orientation. Proponents of extending benefits and protection from discrimination to gay, lesbian, bi-sexual, and transgender (GLBT) employees feel that such extension is a logical continuation of the civil rights movement. Proponents also argue that failure to adopt these policies restricts company access to talented people who can assist the company in meeting its business objectives. Opponents of GLBT-friendly policies and programs believe it legitimizes the GLBT lifestyles that they view as immoral. These groups often characterize these programs as being anti-family and anti-marriage. The financial ramifications of extended benefit programs and the impact of shareholder activism on a company are points that investors may want to consider when evaluating investment opportunities.

Importance of Sexual Orientation issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Non-discrimination policy <i>The inclusion of sexual orientation in the company's non-discrimination policy.</i>	include sexual orientation	do not include sexual orientation	not a factor
Same-sex benefits <i>The provision of domestic partner benefits to same-sex couples.</i>	offer same sex benefits	do not offer same sex benefits	not a factor
HRC Corporate Equality Index <i>The treatment of gay, lesbian, bisexual and transgender employees, consumers and investors according to the Human Rights Campaign Corporate Equality Index.</i>	have better equality score	have worse equality score	not a factor
GLBT diversity training <i>The existence of a diversity training program that addresses gay, lesbian, bisexual and transgender issues according to the Human Rights Campaign.</i>	offer diversity training	do not offer diversity training	not a factor
Citizen Action Now boycott list <i>The Citizen Action Now boycott list (Fortune 500 Companies with Greatest Support for GLBT groups). Citizen Action Now is an organization created to challenge GLBT groups on all fronts.</i>	are on boycott list	are not on boycott list	not a factor

Tobacco

Tobacco ratings evaluate companies involved in the production or processing of tobacco products, wholesale and retail distribution of tobacco products, and suppliers to the tobacco industry. Screening of tobacco companies from an investment portfolio is a traditional values-based and socially responsible investing approach. These investors are concerned with the societal issues of tobacco use, primarily focused on health issues. Other investors may want to avoid companies in the tobacco industry to reduce the risk associated with such investments. Some investors, however, look at the potential investment return, as well as the varying levels of exposure within a company's overall business model, and determine that the rewards outweigh the risks.

Importance of Tobacco issues (check one):

- High
 Medium
 Low
 Not a Factor

Issue	Your Preference (circle one) Favor companies if they...		
Tobacco manufacturing <i>The production or processing of tobacco or tobacco products.</i>	are involved in tobacco manufacturing	are not involved in tobacco manufacturing	not a factor
Tobacco wholesale distribution <i>The business-to-business sale or distribution of tobacco or tobacco products as wholesale products. Companies that manufacture these products are not included.</i>	are involved in tobacco wholesale distribution	are not involved in tobacco wholesale distribution	not a factor
Tobacco revenue - manufacture/wholesale distribution <i>Revenue from the production, processing, or business-to-business distribution of tobacco or tobacco products in the most recent fiscal year.</i>	derive more revenue from tobacco	derive less revenue from tobacco	not a factor
Tobacco revenue percentage - manufacture/wholesale distribution <i>The percentage of revenue derived from the production, processing, or business-to-business distribution of tobacco or tobacco products in the most recent fiscal year.</i>	derive a higher percentage of revenue from tobacco	derive a lower percentage of revenue from tobacco	not a factor

CONTINUED

Tobacco CONTINUED

Issue	Your Preference (circle one) Favor companies if they...		
Tobacco retail sales <i>The retail sale of tobacco products.</i>	are involved in retail tobacco sales	are not involved in retail tobacco sales	not a factor
Tobacco industry suppliers <i>The manufacture of materials (excluding tobacco) intended primarily for use in tobacco products.</i>	are involved in supplying the tobacco industry	are not involved in supplying the tobacco industry	not a factor

NOTES:

THANK YOU!