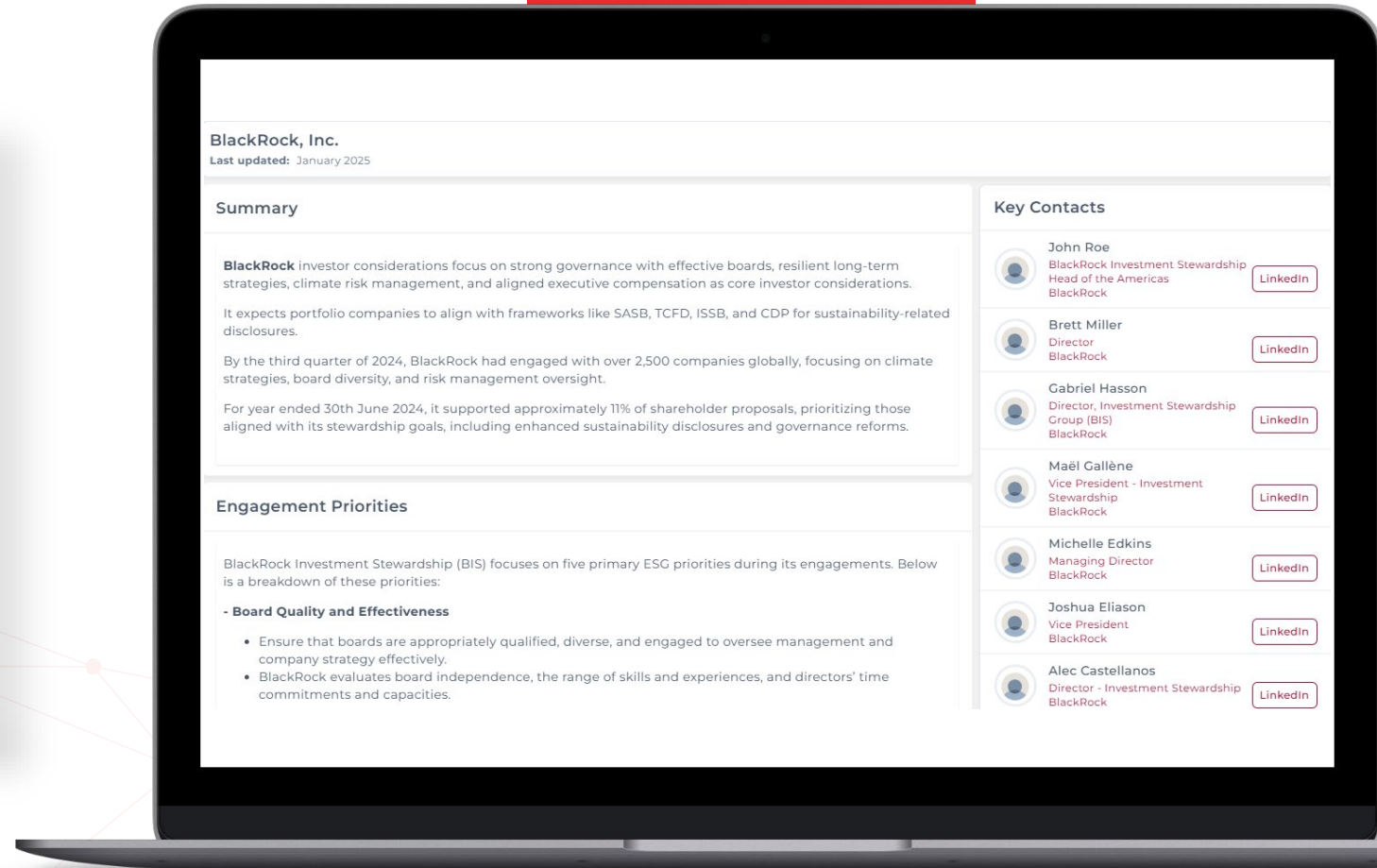


The background features a solid red shape on the left side, which tapers towards the top right. The rest of the background is black, with a series of thin, parallel grey lines that curve from the bottom right towards the top right, creating a sense of depth and movement.

Dashboard Overview

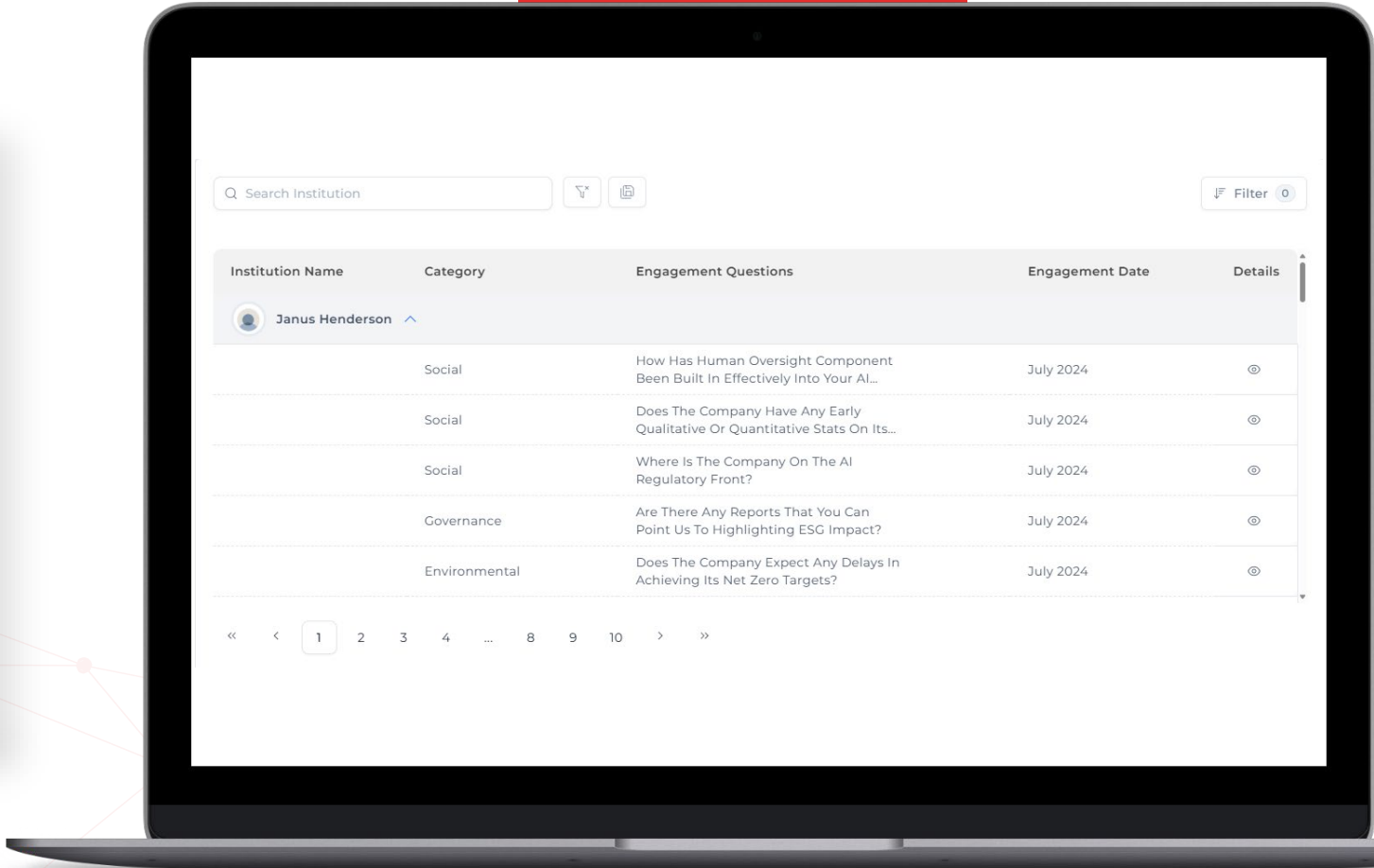
CURATED INVESTOR PROFILES

- Contact Info.
- Team Details and LinkedIn Connections
- Engagement Priorities
- Key Discussion Questions
- Disclosure Expectations
- Engagement and Proxy Voting Overview
- Links to Recent Stewardship Reports



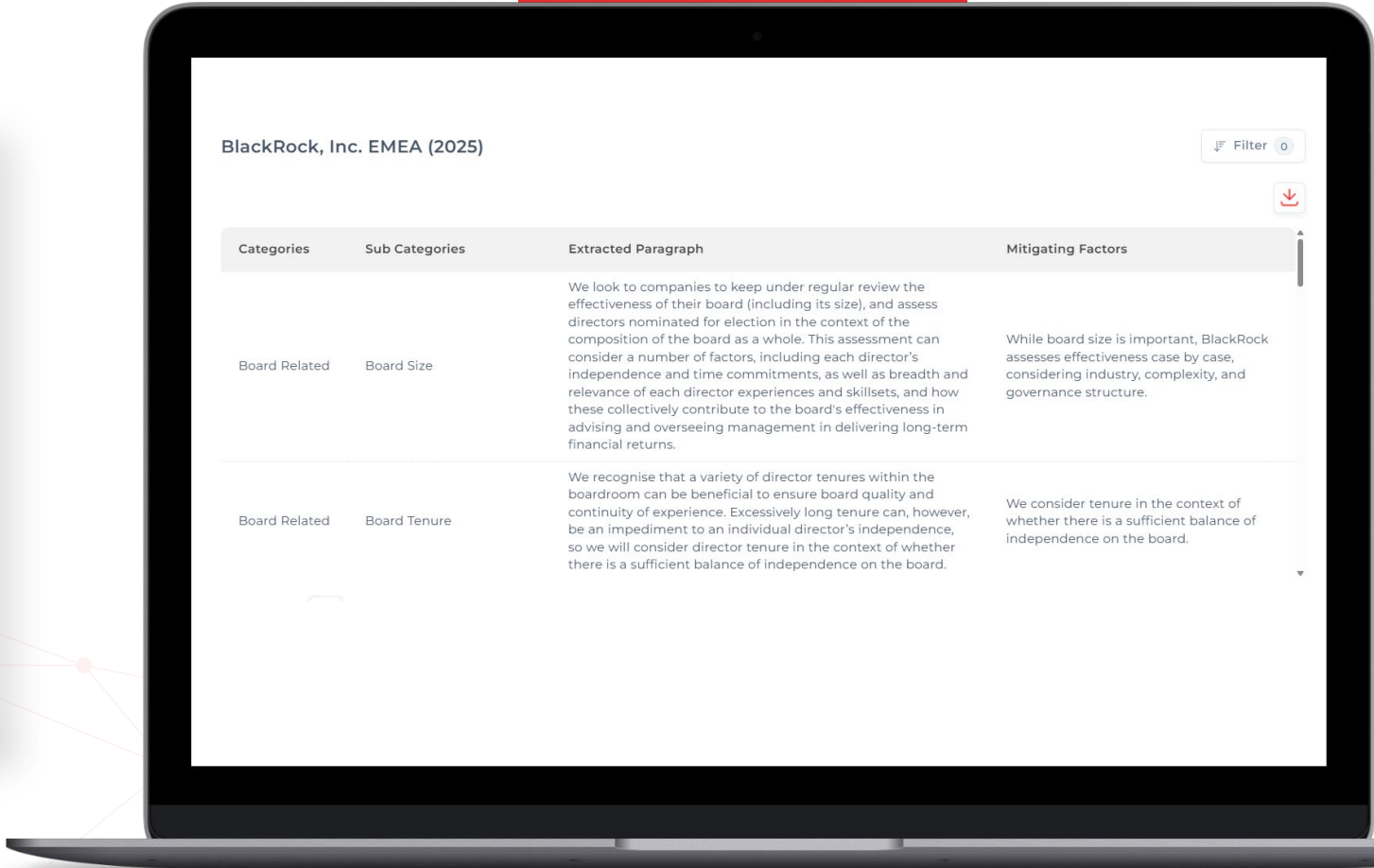
ENGAGEMENT KNOWLEDGE BASE

- Proprietary list of issues and questions discussed by investors during engagements
- User-specific notes and AI-based summary functionality (Smart CRM, expected April 2025)



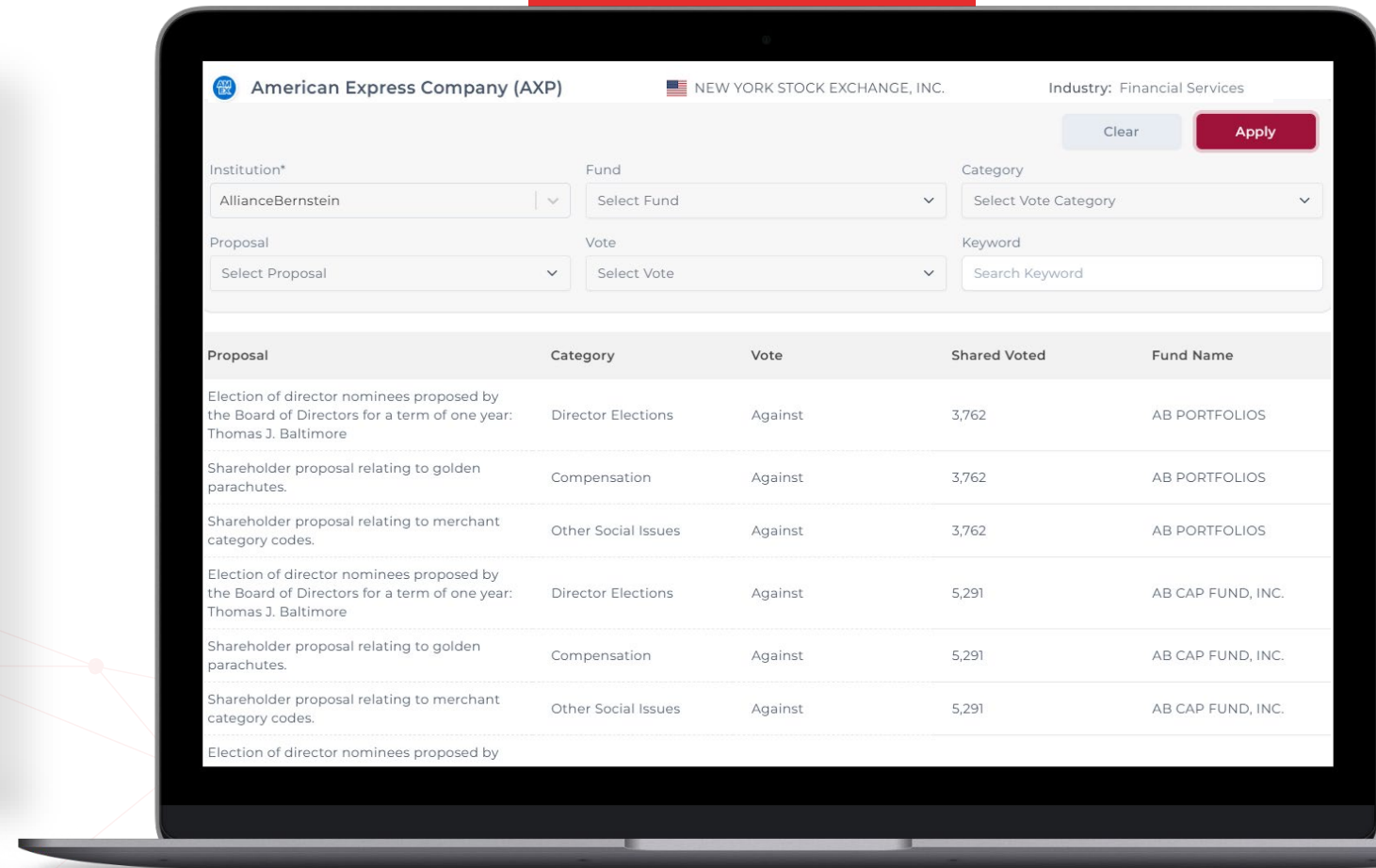
DIGITAL LIBRARY OF VOTING POLICIES

- Access to digital version of proxy voting guidelines for global investors, ISS, and Glass Lewis
- Policies categorized for easy cross reference
- 'Keyword Search' function
- Downloadable PDF copies



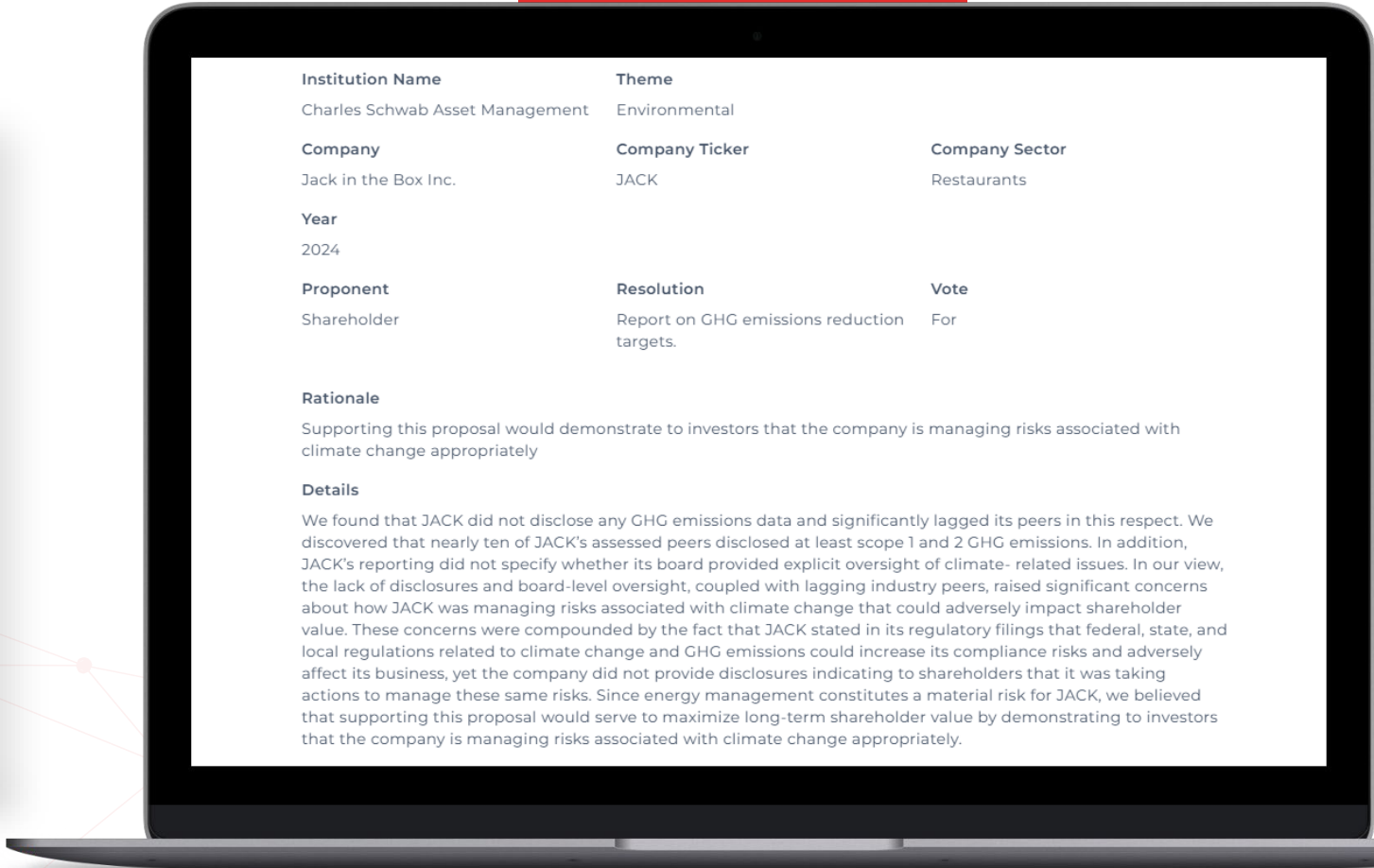
SMART N-PX RECORDS

- +25 million N-PX records
- Real-time data from investor websites (where available)
- Voting rationale for global investors
- Smart search feature:
 - By Keyword, Proposal Type, Proponent, and Vote Cast
- Individual fund level records



ENGAGEMENT CASE STUDIES

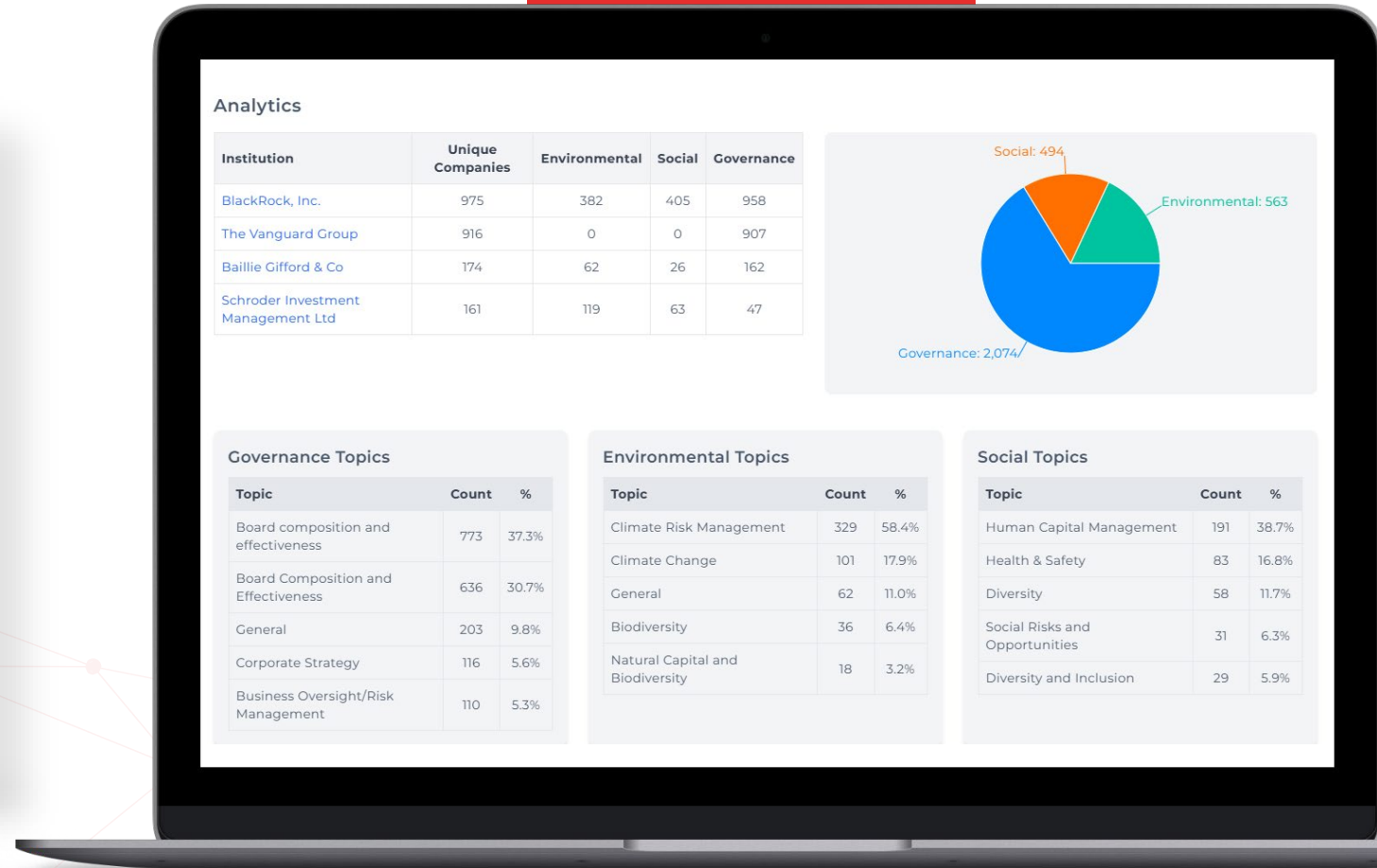
- Over 2,500 case studies on how investors engaged with portfolio companies
- Detailed analysis of key discussion topic, voting rationale, and outcome (where applicable)
- Searchable by industry, ESG topic, and proponent
- Links to source documents



Institution Name	Theme	
Charles Schwab Asset Management	Environmental	
Company	Company Ticker	Company Sector
Jack in the Box Inc.	JACK	Restaurants
Year	2024	
Proponent	Resolution	Vote
Shareholder	Report on GHG emissions reduction targets.	For
Rationale	Supporting this proposal would demonstrate to investors that the company is managing risks associated with climate change appropriately	
Details	We found that JACK did not disclose any GHG emissions data and significantly lagged its peers in this respect. We discovered that nearly ten of JACK's assessed peers disclosed at least scope 1 and 2 GHG emissions. In addition, JACK's reporting did not specify whether its board provided explicit oversight of climate-related issues. In our view, the lack of disclosures and board-level oversight, coupled with lagging industry peers, raised significant concerns about how JACK was managing risks associated with climate change that could adversely impact shareholder value. These concerns were compounded by the fact that JACK stated in its regulatory filings that federal, state, and local regulations related to climate change and GHG emissions could increase its compliance risks and adversely affect its business, yet the company did not provide disclosures indicating to shareholders that it was taking actions to manage these same risks. Since energy management constitutes a material risk for JACK, we believed that supporting this proposal would serve to maximize long-term shareholder value by demonstrating to investors that the company is managing risks associated with climate change appropriately.	

ENGAGEMENT TOPICS

- Unique insights on investor engagement with portfolio companies
- Engagement details for over 2,000 companies
- Ability to conduct peer and industry-level analysis
- Searchable by investor, sector, and themes (Environmental, Social or Governance)
- Built-in analytics tool



SHAREHOLDER PROPOSALS

- Shareholder proposals with related no-action letters, and SEC staff response
- Smart Search Feature:
 - Search proposal text, no-action letters, SEC staff response by keywords and themes
 - Search by proponent, resolved statement, and vote result
- Intel on how top investors voted on the shareholder proposal
- Real-time repository of SEC No-Action Letters

