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Proxy Voting and Social Responsibility

What is Proxy Voting and how does it relate to Faith-Based Investing?

A key tenet of socially responsible investing is the voting of proxies. Proxy voting gives each shareholder a say in the management and direction of corporations, allowing those who own the company to decide on matters of corporate governance. The majority of stockholders are unable to attend a company's Annual General Meeting, therefore, they are able to vote on these matters by proxy instead. Board diversity, environmental and lobbying disclosure, and human rights policies are just some of the issues you can support with your proxies. Reviewing both company and shareholder-sponsored resolutions is critical in supporting good governance and effective socially responsible practices. Indeed, proxy voting is a unique opportunity to both influence corporate behavior and to align your values with your investments.

Proxy voting influences corporate social responsibility by sending a message to corporate leadership that an issue is of shareholder concern. Votes in support of shareholder resolutions not only allow those resolutions to continue to be filed, but also demonstrate an issue is important to shareholders and impact corporate decision making by creating reputational risk. Perhaps more importantly, strong proxy votes on shareholder resolutions can be translated into leverage in corporate engagements. All of this ultimately translates into increased disclosure, policies aligned with values, and strengthened environmental and human rights practices to support social justice as well as long-term shareholder value creation.

Tri-State CRI Proxy Voting Service

The Tri-State Coalition for Responsible Investment, with 40 years of socially responsible investing expertise, offers proxy voting services to our members and other socially responsible investors. Through our service, we take responsibility for casting your ballots on each of the proxy votes for all companies in your equity portfolio through our electronic platform.

We offer certainty that your proxy voting will align with the mission of your community and concerns for Catholic Social Teaching such as the Common Good and the Dignity of all people. As a member of the Interfaith Center on Corporate

Benefits of Our Service:

ESG best practices for proxy voting that strengthen shareholder value, manage risk, and create a healthier, more just world.

Responsibility (ICCR), we ensure that your ballots will support all the shareholder proposals presented by ICCR, as well as any other SRI-related proposals. Lastly, we provide comprehensive record-keeping and reporting of all votes.

About the Tri-State Coalition for Responsible Investment

Founded in 1975, the Tri-State Coalition for Responsible Investment (Tri-State CRI) is a membership organization composed of Roman Catholic religious orders, dioceses and institutions primarily in the New York Tri-State area. Believing that investors' fiduciary duty goes beyond achieving financial results, our members strive to align the mission of their investments with Catholic Social Teaching to create a more just and sustainable world. Through collaboration with the Interfaith Center on Corporate Responsibility, a coalition of 300 institutional investors, Tri-State CRI members are empowered to use their voice as shareholders to engage corporations on social, environmental and governance issues and promote corporate social responsibility.

To learn more, contact:
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