

VOTE SUMMARY REPORT

Date range covered : 07/01/2021 to 06/30/2022

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): HARVEST BRAND LEADERS PLUS INCOME ETF

Microsoft Corporation

Meeting Date: 11/30/2021

Country: USA

Ticker: MSFT

Record Date: 09/30/2021

Meeting Type: Annual

Primary Security ID: 594918104

Shares Voted: 44,568

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Reid G. Hoffman	Mgmt	For	For	For
1.2	Elect Director Hugh F. Johnston	Mgmt	For	For	For
1.3	Elect Director Teri L. List	Mgmt	For	For	For
1.4	Elect Director Satya Nadella	Mgmt	For	For	For
1.5	Elect Director Sandra E. Peterson	Mgmt	For	For	For
1.6	Elect Director Penny S. Pritzker	Mgmt	For	For	For
1.7	Elect Director Carlos A. Rodriguez	Mgmt	For	For	For
1.8	Elect Director Charles W. Scharf	Mgmt	For	For	For
1.9	Elect Director John W. Stanton	Mgmt	For	For	For
1.10	Elect Director John W. Thompson	Mgmt	For	For	For
1.11	Elect Director Emma N. Walmsley	Mgmt	For	For	For
1.12	Elect Director Padmasree Warrior	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
5	Report on Gender/Racial Pay Gap	SH	Against	For	For
6	Report on Effectiveness of Workplace Sexual Harassment Policies	SH	Against	For	For
7	Prohibit Sales of Facial Recognition Technology to All Government Entities	SH	Against	Against	Against
8	Report on Implementation of the Fair Chance Business Pledge	SH	Against	Against	Against
9	Report on Lobbying Activities Alignment with Company Policies	SH	Against	For	For

Royal Dutch Shell Plc

Meeting Date: 12/10/2021

Country: United Kingdom

Ticker: RDSA

Record Date: 11/26/2021

Meeting Type: Special

Primary Security ID: G7690A100

Royal Dutch Shell Plc

Shares Voted: 265,813

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Meeting for ADR Holders	Mgmt			
1	Adopt New Articles of Association	Mgmt	For	For	For

Visa Inc.

Meeting Date: 01/25/2022

Country: USA

Ticker: V

Record Date: 11/26/2021

Meeting Type: Annual

Primary Security ID: 92826C839

Shares Voted: 56,471

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For	For
1b	Elect Director Mary B. Cranston	Mgmt	For	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For	For
1d	Elect Director Alfred F. Kelly, Jr.	Mgmt	For	For	For
1e	Elect Director Ramon Laguarta	Mgmt	For	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For	For
1g	Elect Director Robert W. Matschullat	Mgmt	For	For	For
1h	Elect Director Denise M. Morrison	Mgmt	For	For	For
1i	Elect Director Linda J. Rendle	Mgmt	For	For	For
1j	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For

Accenture plc

Meeting Date: 01/26/2022

Country: Ireland

Ticker: ACN

Record Date: 11/29/2021

Meeting Type: Annual

Primary Security ID: G1151C101

Shares Voted: 37,656

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jaime Ardila	Mgmt	For	For	For
1b	Elect Director Nancy McKinstry	Mgmt	For	For	For

Accenture plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Beth E. Mooney	Mgmt	For	For	For
1d	Elect Director Gilles C. Pelisson	Mgmt	For	For	For
1e	Elect Director Paula A. Price	Mgmt	For	For	For
1f	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For	For
1g	Elect Director Arun Sarin	Mgmt	For	For	For
1h	Elect Director Julie Sweet	Mgmt	For	For	For
1i	Elect Director Frank K. Tang	Mgmt	For	For	For
1j	Elect Director Tracey T. Travis	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Approve KPMG LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
5	Renew the Board's Authority to Issue Shares Under Irish Law	Mgmt	For	For	For
6	Authorize Board to Opt-Out of Statutory Pre-Emption Rights	Mgmt	For	For	For
7	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For

Apple Inc.

Meeting Date: 03/04/2022

Country: USA

Ticker: AAPL

Record Date: 01/03/2022

Meeting Type: Annual

Primary Security ID: 037833100

Shares Voted: 78,869

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director James Bell	Mgmt	For	For	For
1b	Elect Director Tim Cook	Mgmt	For	For	For
1c	Elect Director Al Gore	Mgmt	For	For	For
1d	Elect Director Alex Gorsky	Mgmt	For	For	For
1e	Elect Director Andrea Jung	Mgmt	For	For	For
1f	Elect Director Art Levinson	Mgmt	For	For	For
1g	Elect Director Monica Lozano	Mgmt	For	For	For
1h	Elect Director Ron Sugar	Mgmt	For	For	For
1i	Elect Director Sue Wagner	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

Apple Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Articles of Incorporation to become a Social Purpose Corporation	SH	Against	Against	Against
6	Approve Revision of Transparency Reports	SH	Against	For	For
7	Report on Forced Labor	SH	Against	For	For
8	Report on Median Gender/Racial Pay Gap	SH	Against	For	For
9	Report on Civil Rights Audit	SH	Against	For	For
10	Report on Concealment Clauses	SH	Against	For	For

The Walt Disney Company

Meeting Date: 03/09/2022 **Country:** USA **Ticker:** DIS
Record Date: 01/10/2022 **Meeting Type:** Annual
Primary Security ID: 254687106

Shares Voted: 77,567

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan E. Arnold	Mgmt	For	For	For
1b	Elect Director Mary T. Barra	Mgmt	For	For	For
1c	Elect Director Safra A. Catz	Mgmt	For	For	For
1d	Elect Director Amy L. Chang	Mgmt	For	For	For
1e	Elect Director Robert A. Chapek	Mgmt	For	For	For
1f	Elect Director Francis A. deSouza	Mgmt	For	For	For
1g	Elect Director Michael B.G. Froman	Mgmt	For	For	For
1h	Elect Director Maria Elena Lagomasino	Mgmt	For	For	For
1i	Elect Director Calvin R. McDonald	Mgmt	For	For	For
1j	Elect Director Mark G. Parker	Mgmt	For	For	For
1k	Elect Director Derica W. Rice	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	For	For
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For
6	Report on Human Rights Due Diligence	SH	Against	For	For
7	Report on Gender/Racial Pay Gap	SH	Against	For	For

The Walt Disney Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
8	Report on Workplace Non-Discrimination Audit	SH	Against	Against	Against

Bank of America Corporation

Meeting Date: 04/26/2022

Country: USA

Ticker: BAC

Record Date: 03/01/2022

Meeting Type: Annual

Primary Security ID: 060505104

Shares Voted: 291,314

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Sharon L. Allen	Mgmt	For	For	For
1b	Elect Director Frank P. Bramble, Sr.	Mgmt	For	For	For
1c	Elect Director Pierre J.P. de Weck	Mgmt	For	For	For
1d	Elect Director Arnold W. Donald	Mgmt	For	For	For
1e	Elect Director Linda P. Hudson	Mgmt	For	For	For
1f	Elect Director Monica C. Lozano	Mgmt	For	For	For
1g	Elect Director Brian T. Moynihan	Mgmt	For	For	For
1h	Elect Director Lionel L. Nowell, III	Mgmt	For	For	For
1i	Elect Director Denise L. Ramos	Mgmt	For	For	For
1j	Elect Director Clayton S. Rose	Mgmt	For	For	For
1k	Elect Director Michael D. White	Mgmt	For	For	For
1l	Elect Director Thomas D. Woods	Mgmt	For	For	For
1m	Elect Director R. David Yost	Mgmt	For	For	For
1n	Elect Director Maria T. Zuber	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Adopt the Jurisdiction of Incorporation as the Exclusive Forum for Certain Disputes	Mgmt	For	For	For
5	Report on Civil Rights and Nondiscrimination Audit	SH	Against	Against	Against
6	Adopt Fossil Fuel Lending Policy Consistent with IEA's Net Zero 2050 Scenario	SH	Against	Against	Against
7	Report on Charitable Contributions	SH	Against	Against	Against

Meeting Date: 04/28/2022

Country: USA

Ticker: JNJ

Record Date: 03/01/2022

Meeting Type: Annual

Primary Security ID: 478160104

Shares Voted: 78,562

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For	For
1b	Elect Director Mary C. Beckerle	Mgmt	For	For	For
1c	Elect Director D. Scott Davis	Mgmt	For	For	For
1d	Elect Director Ian E. L. Davis	Mgmt	For	For	For
1e	Elect Director Jennifer A. Doudna	Mgmt	For	For	For
1f	Elect Director Joaquin Duato	Mgmt	For	For	For
1g	Elect Director Alex Gorsky	Mgmt	For	For	For
1h	Elect Director Marillyn A. Hewson	Mgmt	For	For	For
1i	Elect Director Hubert Joly	Mgmt	For	For	For
1j	Elect Director Mark B. McClellan	Mgmt	For	For	For
1k	Elect Director Anne M. Mulcahy	Mgmt	For	For	For
1l	Elect Director A. Eugene Washington	Mgmt	For	For	For
1m	Elect Director Mark A. Weinberger	Mgmt	For	For	For
1n	Elect Director Nadja Y. West	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Adopt a Mandatory Arbitration Bylaw *Withdrawn Resolution*	SH			
6	Report on a Civil Rights, Equity, Diversity and Inclusion Audit	SH	Against	Against	Against
7	Oversee and Report a Racial Equity Audit	SH	Against	For	For
8	Report on Government Financial Support and Access to COVID-19 Vaccines and Therapeutics	SH	Against	For	For
9	Report on Public Health Costs of Limited Sharing of Vaccine Technology	SH	Against	Against	Against
10	Discontinue Global Sales of Baby Powder Containing Talc	SH	Against	Against	Against
11	Report on Charitable Contributions	SH	Against	Against	Against
12	Publish Third-Party Review of Alignment of Company's Lobbying Activities with its Public Statements	SH	Against	For	For

Johnson & Johnson

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
13	Adopt Policy to Include Legal and Compliance Costs in Incentive Compensation Metrics	SH	Against	For	For
14	Consider Pay Disparity Between Executives and Other Employees	SH	Against	Against	Against

PepsiCo, Inc.

Meeting Date: 05/04/2022

Country: USA

Ticker: PEP

Record Date: 03/01/2022

Meeting Type: Annual

Primary Security ID: 713448108

Shares Voted: 78,253

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Segun Agbaje	Mgmt	For	For	For
1b	Elect Director Shona L. Brown	Mgmt	For	For	For
1c	Elect Director Cesar Conde	Mgmt	For	For	For
1d	Elect Director Ian Cook	Mgmt	For	For	For
1e	Elect Director Edith W. Cooper	Mgmt	For	For	For
1f	Elect Director Dina Dublon	Mgmt	For	For	For
1g	Elect Director Michelle Gass	Mgmt	For	For	For
1h	Elect Director Ramon L. Laguarta	Mgmt	For	For	For
1i	Elect Director Dave Lewis	Mgmt	For	For	For
1j	Elect Director David C. Page	Mgmt	For	For	For
1k	Elect Director Robert C. Pohlad	Mgmt	For	For	For
1l	Elect Director Daniel Vasella	Mgmt	For	For	For
1m	Elect Director Darren Walker	Mgmt	For	For	For
1n	Elect Director Alberto Weisser	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against
5	Report on Global Public Policy and Political Influence	SH	Against	Against	Against
6	Report on Public Health Costs of Food and Beverages Products	SH	Against	Against	Against

United Parcel Service, Inc.

Meeting Date: 05/05/2022

Country: USA

Ticker: UPS

Record Date: 03/09/2022

Meeting Type: Annual

Primary Security ID: 911312106

Shares Voted: 69,545

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Carol B. Tome	Mgmt	For	For	For
1b	Elect Director Rodney C. Adkins	Mgmt	For	For	For
1c	Elect Director Eva C. Boratto	Mgmt	For	For	For
1d	Elect Director Michael J. Burns	Mgmt	For	For	For
1e	Elect Director Wayne M. Hewett	Mgmt	For	For	For
1f	Elect Director Angela Hwang	Mgmt	For	For	For
1g	Elect Director Kate E. Johnson	Mgmt	For	For	For
1h	Elect Director William R. Johnson	Mgmt	For	For	For
1i	Elect Director Ann M. Livermore	Mgmt	For	For	For
1j	Elect Director Franck J. Moison	Mgmt	For	For	For
1k	Elect Director Christiana Smith Shi	Mgmt	For	For	For
1l	Elect Director Russell Stokes	Mgmt	For	For	For
1m	Elect Director Kevin Warsh	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Lobbying Payments and Policy	SH	Against	For	For
5	Report on Corporate Climate Lobbying Aligned with Paris Agreement	SH	Against	For	For
6	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
7	Adopt Independently Verified Science-Based GHG Reduction Targets	SH	Against	For	For
8	Report on Balancing Climate Measures and Financial Returns	SH	Against	Against	Against
9	Report on Effectiveness of Diversity Equity and Inclusion Efforts and Metrics	SH	Against	For	For

Intel Corporation

Meeting Date: 05/12/2022

Country: USA

Ticker: INTC

Record Date: 03/18/2022

Meeting Type: Annual

Primary Security ID: 458140100

Intel Corporation

Shares Voted: 292,957

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Patrick P. Gelsinger	Mgmt	For	For	For
1b	Elect Director James J. Goetz	Mgmt	For	For	For
1c	Elect Director Andrea J. Goldsmith	Mgmt	For	For	For
1d	Elect Director Alyssa H. Henry	Mgmt	For	Against	Against
1e	Elect Director Omar Ishrak	Mgmt	For	Against	Against
1f	Elect Director Risa Lavizzo-Mourey	Mgmt	For	Against	Against
1g	Elect Director Tsu-Jae King Liu	Mgmt	For	For	For
1h	Elect Director Gregory D. Smith	Mgmt	For	For	For
1i	Elect Director Dion J. Weisler	Mgmt	For	Against	Against
1j	Elect Director Frank D. Yeary	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
4	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For
6	Report on Third-Party Civil Rights Audit	SH	Against	Against	Against

Verizon Communications Inc.

Meeting Date: 05/12/2022

Country: USA

Ticker: VZ

Record Date: 03/14/2022

Meeting Type: Annual

Primary Security ID: 92343V104

Shares Voted: 271,834

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Shellye Archambeau	Mgmt	For	For	For
1.2	Elect Director Roxanne Austin	Mgmt	For	For	For
1.3	Elect Director Mark Bertolini	Mgmt	For	For	For
1.4	Elect Director Melanie Healey	Mgmt	For	For	For
1.5	Elect Director Laxman Narasimhan	Mgmt	For	For	For
1.6	Elect Director Clarence Otis, Jr.	Mgmt	For	For	For
1.7	Elect Director Daniel Schulman	Mgmt	For	For	For
1.8	Elect Director Rodney Slater	Mgmt	For	For	For
1.9	Elect Director Carol Tome	Mgmt	For	For	For

Verizon Communications Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Hans Vestberg	Mgmt	For	For	For
1.11	Elect Director Gregory Weaver	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Report on Charitable Contributions	SH	Against	Against	Against
5	Amend Senior Executive Compensation Clawback Policy	SH	Against	For	For
6	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	For	For
7	Report on Operations in Communist China	SH	Against	Against	Against

JPMorgan Chase & Co.

Meeting Date: 05/17/2022 **Country:** USA **Ticker:** JPM
Record Date: 03/18/2022 **Meeting Type:** Annual
Primary Security ID: 46625H100

Shares Voted: 96,466

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	For	For	For
1b	Elect Director Stephen B. Burke	Mgmt	For	For	For
1c	Elect Director Todd A. Combs	Mgmt	For	For	For
1d	Elect Director James S. Crown	Mgmt	For	For	For
1e	Elect Director James Dimon	Mgmt	For	For	For
1f	Elect Director Timothy P. Flynn	Mgmt	For	For	For
1g	Elect Director Melody Hobson	Mgmt	For	For	For
1h	Elect Director Michael A. Neal	Mgmt	For	For	For
1i	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1j	Elect Director Virginia M. Rometty	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Adopt Fossil Fuel Financing Policy Consistent with IEA's Net Zero 2050 Scenario	SH	Against	Against	Against
5	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For
6	Require Independent Board Chair	SH	Against	For	For
7	Disclose Director Skills and Qualifications Including Ideological Perspectives	SH	Against	Against	Against

JPMorgan Chase & Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
8	Amend Certificate of Incorporation to Become a Public Benefit Corporation	SH	Against	Against	Against
9	Report on Absolute Targets for Financed GHG Emissions in Line with Net Zero Commitments	SH	Against	Against	Against

Shell Plc

Meeting Date: 05/24/2022 **Country:** United Kingdom **Ticker:** SHEL
Record Date: 04/11/2022 **Meeting Type:** Annual
Primary Security ID: G80827101

Shares Voted: 298,483

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Meeting for ADR Holders	Mgmt			
	Management Proposals	Mgmt			
1	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For
2	Approve Remuneration Report	Mgmt	For	For	For
3	Elect Sinead Gorman as Director	Mgmt	For	For	For
4	Re-elect Ben van Beurden as Director	Mgmt	For	For	For
5	Re-elect Dick Boer as Director	Mgmt	For	For	For
6	Re-elect Neil Carson as Director	Mgmt	For	For	For
7	Re-elect Ann Godbehere as Director	Mgmt	For	For	For
8	Re-elect Euleen Goh as Director	Mgmt	For	For	For
9	Re-elect Jane Lute as Director	Mgmt	For	For	For
10	Re-elect Catherine Hughes as Director	Mgmt	For	For	For
11	Re-elect Martina Hund-Mejean as Director	Mgmt	For	For	For
12	Re-elect Sir Andrew Mackenzie as Director	Mgmt	For	For	For
13	Re-elect Abraham Schot as Director	Mgmt	For	For	For
14	Reappoint Ernst & Young LLP as Auditors	Mgmt	For	For	For
15	Authorise the Audit Committee to Fix Remuneration of Auditors	Mgmt	For	For	For
16	Authorise Issue of Equity	Mgmt	For	For	For
17	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
18	Authorise Market Purchase of Ordinary Shares	Mgmt	For	For	For
19	Authorise Off-Market Purchase of Ordinary Shares	Mgmt	For	For	For

Shell Plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
20	Approve the Shell Energy Transition Progress Update	Mgmt	For	For	For
	Shareholder Proposal	Mgmt			
21	Request Shell to Set and Publish Targets for Greenhouse Gas (GHG) Emissions	SH	Against	Against	Against

McDonald's Corporation

Meeting Date: 05/26/2022 **Country:** USA **Ticker:** MCD
Record Date: 03/28/2022 **Meeting Type:** Proxy Contest
Primary Security ID: 580135101

Shares Voted: 58,578

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Management Proxy (White Proxy Card)	Mgmt			
1.1	Elect Director Lloyd Dean	Mgmt	For	For	For
1.2	Elect Director Robert Eckert	Mgmt	For	For	For
1.3	Elect Director Catherine Engelbert	Mgmt	For	For	For
1.4	Elect Director Margaret Georgiadis	Mgmt	For	For	For
1.5	Elect Director Enrique Hernandez, Jr.	Mgmt	For	For	For
1.6	Elect Director Christopher Kempczinski	Mgmt	For	For	For
1.7	Elect Director Richard Lenny	Mgmt	For	For	For
1.8	Elect Director John Mulligan	Mgmt	For	For	For
1.9	Elect Director Sheila Penrose	Mgmt	For	For	For
1.10	Elect Director John Rogers, Jr.	Mgmt	For	For	For
1.11	Elect Director Paul Walsh	Mgmt	For	For	For
1.12	Elect Director Miles White	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For
5	Report on Efforts to Reduce Plastic Use	SH	Against	For	For
6	Report on Public Health Costs of Antibiotic Use and Impact on Diversified Shareholders	SH	Against	Against	Against
7	Report on Use of Gestation Stalls in Pork Supply Chain	SH	Against	Against	Against
8	Report on Third-Party Civil Rights Audit	SH	Against	For	For
9	Report on Lobbying Payments and Policy	SH	Against	For	For

McDonald's Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
10	Issue Transparency Report on Global Public Policy and Political Influence	SH	Against	Against	Against
	Dissident Proxy (Gold Proxy Card)	Mgmt			
1.1	Elect Director Leslie Samuelrich	SH	For	Do Not Vote	Do Not Vote
1.2	Elect Director Maisie Lucia Ganzler	SH	For	Do Not Vote	Do Not Vote
1.3	Management Nominee Lloyd Dean	SH	For	Do Not Vote	Do Not Vote
1.4	Management Nominee Robert Eckert	SH	For	Do Not Vote	Do Not Vote
1.5	Management Nominee Catherine Engelbert	SH	For	Do Not Vote	Do Not Vote
1.6	Management Nominee Margaret Georgiadis	SH	For	Do Not Vote	Do Not Vote
1.7	Management Nominee Enrique Hernandez, Jr.	SH	For	Do Not Vote	Do Not Vote
1.8	Management Nominee Christopher Kempczinski	SH	For	Do Not Vote	Do Not Vote
1.9	Management Nominee John Mulligan	SH	For	Do Not Vote	Do Not Vote
1.10	Management Nominee John Rogers, Jr.	SH	For	Do Not Vote	Do Not Vote
1.11	Management Nominee Paul Walsh	SH	For	Do Not Vote	Do Not Vote
1.12	Management Nominee Miles White	SH	For	Do Not Vote	Do Not Vote
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Against	Do Not Vote	Do Not Vote
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	Do Not Vote	Do Not Vote
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	For	Do Not Vote	Do Not Vote
5	Report on Efforts to Reduce Plastic Use	SH	For	Do Not Vote	Do Not Vote
6	Report on Public Health Costs of Antibiotic Use and Impact on Diversified Shareholders	SH	For	Do Not Vote	Do Not Vote
7	Report on Use of Gestation Stalls in Pork Supply Chain	SH	For	Do Not Vote	Do Not Vote
8	Report on Third-Party Civil Rights Audit	SH	For	Do Not Vote	Do Not Vote
9	Report on Lobbying Payments and Policy	SH	For	Do Not Vote	Do Not Vote
10	Issue Transparency Report on Global Public Policy and Political Influence	SH	For	Do Not Vote	Do Not Vote

Morgan Stanley

Meeting Date: 05/26/2022

Country: USA

Ticker: MS

Record Date: 03/28/2022

Meeting Type: Annual

Primary Security ID: 617446448

Shares Voted: 146,211

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Alistair Darling	Mgmt	For	For	For
1b	Elect Director Thomas H. Glocer	Mgmt	For	For	For
1c	Elect Director James P. Gorman	Mgmt	For	For	For
1d	Elect Director Robert H. Herz	Mgmt	For	For	For
1e	Elect Director Erika H. James	Mgmt	For	For	For
1f	Elect Director Hironori Kamezawa	Mgmt	For	For	For
1g	Elect Director Shelley B. Leibowitz	Mgmt	For	For	For
1h	Elect Director Stephen J. Luczo	Mgmt	For	For	For
1i	Elect Director Jami Miscik	Mgmt	For	For	For
1j	Elect Director Masato Miyachi	Mgmt	For	For	For
1k	Elect Director Dennis M. Nally	Mgmt	For	For	For
1l	Elect Director Mary L. Schapiro	Mgmt	For	For	For
1m	Elect Director Perry M. Traquina	Mgmt	For	For	For
1n	Elect Director Rayford Wilkins, Jr.	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Adopt Fossil Fuel Lending and Underwriting Policy Consistent with IEA's Net Zero 2050 Scenario	SH	Against	Against	Against

Alphabet Inc.

Meeting Date: 06/01/2022

Country: USA

Ticker: GOOGL

Record Date: 04/05/2022

Meeting Type: Annual

Primary Security ID: 02079K305

Shares Voted: 5,717

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Larry Page	Mgmt	For	For	For
1b	Elect Director Sergey Brin	Mgmt	For	For	For
1c	Elect Director Sundar Pichai	Mgmt	For	For	For
1d	Elect Director John L. Hennessy	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Frances H. Arnold	Mgmt	For	For	For
1f	Elect Director L. John Doerr	Mgmt	For	For	For
1g	Elect Director Roger W. Ferguson, Jr.	Mgmt	For	For	For
1h	Elect Director Ann Mather	Mgmt	For	For	For
1i	Elect Director K. Ram Shriram	Mgmt	For	For	For
1j	Elect Director Robin L. Washington	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
4	Increase Authorized Common Stock	Mgmt	For	For	For
5	Report on Lobbying Payments and Policy	SH	Against	For	For
6	Report on Climate Lobbying	SH	Against	For	For
7	Report on Physical Risks of Climate Change	SH	Against	For	For
8	Report on Metrics and Efforts to Reduce Water Related Risk	SH	Against	For	For
9	Oversee and Report a Third-Party Racial Equity Audit	SH	Against	For	For
10	Report on Risks Associated with Use of Concealment Clauses	SH	Against	Against	Against
11	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
12	Report on Government Takedown Requests	SH	Against	Against	Against
13	Report on Risks of Doing Business in Countries with Significant Human Rights Concerns	SH	Against	For	For
14	Report on Managing Risks Related to Data Collection, Privacy and Security	SH	Against	Against	Against
15	Disclose More Quantitative and Qualitative Information on Algorithmic Systems	SH	Against	For	For
16	Commission Third Party Assessment of Company's Management of Misinformation and Disinformation Across Platforms	SH	Against	For	For
17	Report on External Costs of Misinformation and Impact on Diversified Shareholders	SH	Against	Against	Against
18	Report on Steps to Improve Racial and Gender Board Diversity	SH	Against	Against	Against
19	Establish an Environmental Sustainability Board Committee	SH	Against	Against	Against
20	Adopt a Policy to Include Non-Management Employees as Prospective Director Candidates	SH	Against	Against	Against
21	Report on Policies Regarding Military and Militarized Policing Agencies	SH	Against	Against	Against

UnitedHealth Group Incorporated

Meeting Date: 06/06/2022

Country: USA

Ticker: UNH

Record Date: 04/08/2022

Meeting Type: Annual

Primary Security ID: 91324P102

Shares Voted: 32,795

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Timothy P. Flynn	Mgmt	For	For	For
1b	Elect Director Paul R. Garcia	Mgmt	For	For	For
1c	Elect Director Stephen J. Hemsley	Mgmt	For	For	For
1d	Elect Director Michele J. Hooper	Mgmt	For	For	For
1e	Elect Director F. William McNabb, III	Mgmt	For	For	For
1f	Elect Director Valerie C. Montgomery Rice	Mgmt	For	For	For
1g	Elect Director John H. Noseworthy	Mgmt	For	For	For
1h	Elect Director Andrew Witty	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	For	For
5	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	For	For

Caterpillar Inc.

Meeting Date: 06/08/2022

Country: USA

Ticker: CAT

Record Date: 04/13/2022

Meeting Type: Annual

Primary Security ID: 149123101

Shares Voted: 71,603

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Kelly A. Ayotte	Mgmt	For	For	For
1.2	Elect Director David L. Calhoun	Mgmt	For	For	For
1.3	Elect Director Daniel M. Dickinson	Mgmt	For	For	For
1.4	Elect Director Gerald Johnson	Mgmt	For	For	For
1.5	Elect Director David W. MacLennan	Mgmt	For	For	For
1.6	Elect Director Debra L. Reed-Klages	Mgmt	For	For	For
1.7	Elect Director Edward B. Rust, Jr.	Mgmt	For	For	For
1.8	Elect Director Susan C. Schwab	Mgmt	For	For	For
1.9	Elect Director D. James Umpleby, III	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.10	Elect Director Rayford Wilkins, Jr.	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Long-Term Greenhouse Gas Targets Aligned with Paris Agreement	SH	For	For	For
5	Report on Lobbying Payments and Policy	SH	Against	For	For
6	Report on Risks of Doing Business in Conflict-Affected Areas	SH	Against	Against	Against
7	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	For	For