

VOTE SUMMARY REPORT

Date range covered : 07/01/2024 to 06/30/2025

LOCATION(S): ALL LOCATIONS

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

NIKE, Inc.

Meeting Date: 09/10/2024Country: USATicker: NKE

Record Date: 07/10/2024Meeting Type: Annual

Primary Security ID: 654106103

Shares Voted: 184,867

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cathleen Benko	Mgmt	For	For	For
1b	Elect Director John Rogers, Jr.	Mgmt	For	Withhold	Withhold
1c	Elect Director Robert Swan	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	Report on Median Gender/Racial Pay Gaps	SH	Against	For	For
5	Report on Effectiveness of Supply Chain Management on Equity Goals and Human Rights Commitments	SH	Against	Against	Against
6	Report on the Impact of Work-Driven Responsibility Principles and Supporting Binding Agreements in Sourcing from High-Risk Countries	SH	Against	Against	Against
7	Report on Environmental Targets	SH	Against	For	For
8	Report on Congruency of Voluntary Partnerships with Company's Fiduciary Duties	SH	Against	Against	Against

The Procter & Gamble Company

Meeting Date: 10/08/2024Country: USATicker: PG

Record Date: 08/09/2024Meeting Type: Annual

Primary Security ID: 742718109

Shares Voted: 109,944

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director B. Marc Allen	Mgmt	For	For	For

The Procter & Gamble Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Brett Biggs	Mgmt	For	For	For
1c	Elect Director Sheila Bonini	Mgmt	For	For	For
1d	Elect Director Amy L. Chang	Mgmt	For	For	For
1e	Elect Director Joseph Jimenez	Mgmt	For	For	For
1f	Elect Director Christopher Kempczinski	Mgmt	For	For	For
1g	Elect Director Debra L. Lee	Mgmt	For	For	For
1h	Elect Director Terry J. Lundgren	Mgmt	For	For	For
1i	Elect Director Christine M. McCarthy	Mgmt	For	For	For
1j	Elect Director Ashley McEvoy	Mgmt	For	For	For
1k	Elect Director Jon R. Moeller	Mgmt	For	For	For
1l	Elect Director Robert J. Portman	Mgmt	For	For	For
1m	Elect Director Rajesh Subramaniam	Mgmt	For	For	For
1n	Elect Director Patricia A. Woertz	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	Report on Median Gender/Racial Pay Gap	SH	Against	For	For

Cisco Systems, Inc.

Meeting Date: 12/09/2024

Record Date: 10/10/2024

Primary Security ID: 17275R102

Country: USA

Meeting Type: Annual

Ticker: CSCO

Shares Voted: 365,702

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wesley G. Bush	Mgmt	For	For	For
1b	Elect Director Michael D. Capellas	Mgmt	For	For	For
1c	Elect Director Mark Garrett	Mgmt	For	For	For
1d	Elect Director John D. Harris, II	Mgmt	For	For	For
1e	Elect Director Kristina M. Johnson	Mgmt	For	For	For

Cisco Systems, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Sarah Rae Murphy	Mgmt	For	For	For
1g	Elect Director Charles H. Robbins	Mgmt	For	For	For
1h	Elect Director Daniel H. Schulman	Mgmt	For	For	For
1i	Elect Director Marianna Tessel	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

Microsoft Corporation

Meeting Date: 12/10/2024

Record Date: 09/30/2024

Primary Security ID: 594918104

Country: USA

Meeting Type: Annual

Ticker: MSFT

Shares Voted: 42,055

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 Catherine MacGregor	Mgmt	For	For	For
1.5	Elect Director Mark A. L. Mason	Mgmt	For	For	For
1.6	Elect Director Satya Nadella	Mgmt	For	For	For
1.7	Elect Director Sandra E. Peterson	Mgmt	For	For	For
1.8	Elect Director Penny S. Pritzker	Mgmt	For	For	For
1.9	Elect Director Carlos A. Rodriguez	Mgmt	For	For	For
1.10	Elect Director Charles W. Scharf	Mgmt	For	For	For
1.11	Elect Director John W. Stanton	Mgmt	For	For	For
1.12	Elect Director Emma N. Walmsley	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

Microsoft Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Risks of Weapons Development	SH	Against	Against	Against
5	Assess and Report on Investing in Bitcoin	SH	Against	Against	Against
6	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Against	For	For
7	Report on Risks of Using Artificial Intelligence and Machine Learning Tools for Oil and Gas Development and Production	SH	Against	Against	Against
8	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Against	Against	Against
9	Report on AI Data Sourcing Accountability	SH	Against	For	For

Visa Inc.

Meeting Date: 01/28/2025

Record Date: 12/02/2024

Primary Security ID: 92826C839

Country: USA

Meeting Type: Annual

Ticker: V

Shares Voted: 60,628

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 Kermit R. Crawford	Mgmt	For	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For	For
1d	Elect Director Ramon Laguarta	Mgmt	For	For	For
1e	Elect Director Teri L. List	Mgmt	For	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For	For
1g	Elect Director Ryan McInerney	Mgmt	For	For	For
1h	Elect Director Denise M. Morrison	Mgmt	For	For	For
1i	Elect Director Pamela Murphy	Mgmt	For	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For	For
1k	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

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against	Against
5	Report on Company's Policy on Merchant Category Codes	SH	Against	Against	Against
6	Amend Bylaws to Adopt a New Director Election Resignation Governance Guideline	SH	Against	Against	Against
7	Report on Lobbying Payments and Policy	SH	Against	Against	Against

Accenture plc

Meeting Date: 02/06/2025

Country: Ireland

Ticker: ACN

Record Date: 12/09/2024

Meeting Type: Annual

Primary Security ID: G1151C101

Shares Voted: 51,509

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jaime Ardila	Mgmt	For	For	For
1b	Elect Director Martin Brudermuller	Mgmt	For	For	For
1c	Elect Director Alan Jope	Mgmt	For	For	For
1d	Elect Director Nancy McKinstry	Mgmt	For	For	For
1e	Elect Director Jennifer Nason	Mgmt	For	For	For
1f	Elect Director Paula A. Price	Mgmt	For	For	For
1g	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For	For
1h	Elect Director Arun Sarin	Mgmt	For	For	For
1i	Elect Director Julie Sweet	Mgmt	For	For	For
1j	Elect Director Tracey T. Travis	Mgmt	For	For	For
1k	Elect Director Masahiko Uotani	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors and Authorise Their Remuneration	Mgmt	For	For	For
4	Approve Capital Reduction of the Share Premium Account	Mgmt	For	For	For
5	Authorize Board to Issue Shares under Irish Law	Mgmt	For	For	For

Accenture plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Authorize the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	For	For	For
7	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For	For

Apple Inc.

Meeting Date: 02/25/2025

Country: USA

Ticker: AAPL

Record Date: 01/02/2025

Meeting Type: Annual

Primary Security ID: 037833100

Shares Voted: 76,013

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda Austin	Mgmt	For	For	For
1b	Elect Director Tim Cook	Mgmt	For	For	For
1c	Elect Director Alex Gorsky	Mgmt	For	For	For
1d	Elect Director Andrea Jung	Mgmt	For	For	For
1e	Elect Director Art Levinson	Mgmt	For	For	For
1f	Elect Director Monica Lozano	Mgmt	For	For	For
1g	Elect Director Ron Sugar	Mgmt	For	For	For
1h	Elect Director Sue Wagner	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	For	For
4	Report on Ethical AI Data Acquisition and Usage	SH	Against	Against	Against
5	Report on Child Safety Online	SH	Against	Against	Against
6	Consider Abolishing DEI Policies, Programs, Departments, and Goals	SH	Against	Against	Against
7	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against

Texas Instruments Incorporated

Meeting Date: 04/17/2025

Country: USA

Ticker: TXN

Record Date: 02/20/2025

Meeting Type: Annual

Primary Security ID: 882508104

Texas Instruments Incorporated

Shares Voted: 106,008

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark Blinn	Mgmt	For	For	For
1b	Elect Director Todd Bluedorn	Mgmt	For	For	For
1c	Elect Director Janet Clark	Mgmt	For	For	For
1d	Elect Director Carrie Cox	Mgmt	For	For	For
1e	Elect Director Martin Craighead	Mgmt	For	For	For
1f	Elect Director Reginald DesRoches	Mgmt	For	For	For
1g	Elect Director Curtis Farmer	Mgmt	For	For	For
1h	Elect Director Jean Hobby	Mgmt	For	For	For
1i	Elect Director Haviv Ilan	Mgmt	For	For	For
1j	Elect Director Ronald Kirk	Mgmt	For	For	For
1k	Elect Director Pamela Patsley	Mgmt	For	For	For
1l	Elect Director Robert Sanchez	Mgmt	For	For	For
1m	Elect Director Richard Templeton	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

Broadcom Inc.

Meeting Date: 04/21/2025Country: USATicker: AVGO

Record Date: 02/21/2025Meeting Type: Annual

Primary Security ID: 11135F101

Shares Voted: 88,673

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Diane M. Bryant	Mgmt	For	For	For
1b	Elect Director Gayla J. Delly	Mgmt	For	For	For
1c	Elect Director Kenneth Y. Hao	Mgmt	For	For	For
1d	Elect Director Eddy W. Hartenstein	Mgmt	For	For	For
1e	Elect Director Check Kian Low	Mgmt	For	For	For

Broadcom Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Justine F. Page	Mgmt	For	For	For
1g	Elect Director Henry Samueli	Mgmt	For	For	For
1h	Elect Director Hock E. Tan	Mgmt	For	For	For
1i	Elect Director Harry L. You	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

Wells Fargo & Company

Meeting Date: 04/29/2025Country: USATicker: WFC

Record Date: 03/03/2025Meeting Type: Annual

Primary Security ID: 949746101

Shares Voted: 245,539

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Steven D. Black	Mgmt	For	For	For
1b	Elect Director Mark A. Chancy	Mgmt	For	For	For
1c	Elect Director Celeste A. Clark	Mgmt	For	For	For
1d	Elect Director Theodore F. Craver, Jr.	Mgmt	For	For	For
1e	Elect Director Richard K. Davis	Mgmt	For	For	For
1f	Elect Director Fabian T. Garcia	Mgmt	For	For	For
1g	Elect Director Wayne M. Hewett	Mgmt	For	For	For
1h	Elect Director CeCelia G. Morken	Mgmt	For	For	For
1i	Elect Director Maria R. Morris	Mgmt	For	For	For
1j	Elect Director Felicia F. Norwood	Mgmt	For	For	For
1k	Elect Director Ronald L. Sargent	Mgmt	For	For	For
1l	Elect Director Charles W. Scharf	Mgmt	For	For	For
1m	Elect Director Suzanne M. Vautrinot	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

Wells Fargo & Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Report on Prevention of Workplace Harassment and Discrimination	SH	Against	Against	Against
5	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	Against	Against
6	Report Annually on Energy Supply Ratio	SH	Against	Against	Against
7	Report on Respecting Indigenous Peoples' Rights	SH	Against	Against	Against

The Coca-Cola Company

Meeting Date: 04/30/2025

Country: USA

Ticker: KO

Record Date: 03/03/2025

Meeting Type: Annual

Primary Security ID: 191216100

Shares Voted: 304,728

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Herb Allen	Mgmt	For	For	For
1.2	Elect Director Bela Bajaria	Mgmt	For	For	For
1.3	Elect Director Ana Botin	Mgmt	For	For	For
1.4	Elect Director Christopher C. Davis	Mgmt	For	For	For
1.5	Elect Director Carolyn Everson	Mgmt	For	For	For
1.6	Elect Director Thomas S. Gayner	Mgmt	For	For	For
1.7	Elect Director Maria Elena Lagomasino	Mgmt	For	For	For
1.8	Elect Director Amity Millhiser	Mgmt	For	For	For
1.9	Elect Director James Quincey	Mgmt	For	For	For
1.10	Elect Director Caroline J. Tsay	Mgmt	For	For	For
1.11	Elect Director David B. Weinberg	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	Issue Third Party Assessment of Safety of Non-Sugar Sweeteners	SH	Against	Against	Against
5	Report on Food Waste Management and Targets to Reduce Food Waste	SH	Against	Against	Against

The Coca-Cola Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Establish a Board Committee on Improper Influence	SH	Against	Against	Against
7	Consider Abolishing DEI Goals from Compensation Inducements	SH	Against	Against	Against
8	Report on Impacts Related to Associating Brand with Politically Divisive Events	SH	Against	Against	Against
9	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

PepsiCo, Inc.

Meeting Date: 05/07/2025

Country: USA

Ticker: PEP

Record Date: 02/27/2025

Meeting Type: Annual

Primary Security ID: 713448108

Shares Voted: 128,005

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Segun Agbaje	Mgmt	For	For	For
1b	Elect Director Jennifer Bailey	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 Susan M. Diamond	Mgmt	For	For	For
1g	Elect Director Dina Dublon	Mgmt	For	For	For
1h	Elect Director Michelle Gass	Mgmt	For	For	For
1i	Elect Director Ramon L. Laguarta	Mgmt	For	For	For
1j	Elect Director Dave J. Lewis	Mgmt	For	For	For
1k	Elect Director David C. Page	Mgmt	For	For	For
1l	Elect Director Robert C. Pohlad	Mgmt	For	For	For
1m	Elect Director Daniel Vasella	Mgmt	For	For	For
1n	Elect Director Darren Walker	Mgmt	For	For	For
1o	Elect Director Alberto Weissner	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

PepsiCo, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Issue Third Party Assessment of Safety of Non-Sugar Sweeteners	SH	Against	Against	Against
5	Report on Third-Party Racial Equity Audit	SH	Against	Against	Against
6	Report on Risks Related to Biodiversity and Nature Loss	SH	Against	Against	Against
7	Report on Plastic Packaging	SH	Against	Against	Against

Morgan Stanley

Meeting Date: 05/15/2025Country: USATicker: MS

Record Date: 03/17/2025Meeting Type: Annual

Primary Security ID: 617446448

Shares Voted: 137,955

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Megan Butler	Mgmt	For	For	For
1b	Elect Director Thomas H. Glocer	Mgmt	For	For	For
1c	Elect Director Robert H. Herz	Mgmt	For	For	For
1d	Elect Director Erika H. James	Mgmt	For	For	For
1e	Elect Director Hironori Kamezawa	Mgmt	For	For	For
1f	Elect Director Shelley B. Leibowitz	Mgmt	For	For	For
1g	Elect Director Jami Miscik	Mgmt	For	For	For
1h	Elect Director Masato Miyachi	Mgmt	For	For	For
1i	Elect Director Dennis M. Nally	Mgmt	For	For	For
1j	Elect Director Douglas L. Peterson	Mgmt	For	For	For
1k	Elect Director Edward Pick	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	Amend Omnibus Stock Plan	Mgmt	For	Against	Against

Morgan Stanley

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Report Annually on Energy Supply Ratio	SH	Against	Against	Against

JPMorgan Chase & Co.

Meeting Date: 05/20/2025	Country: USA	Ticker: JPM
Record Date: 03/21/2025	Meeting Type: Annual	
Primary Security ID: 46625H100		

Shares Voted: 71,877					
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 Michele G. Buck	Mgmt	For	For	For
1c	Elect Director Stephen B. Burke	Mgmt	For	For	For
1d	Elect Director Todd A. Combs	Mgmt	For	For	For
1e	Elect Director Alicia Boler Davis	Mgmt	For	For	For
1f	Elect Director James Dimon	Mgmt	For	For	For
1g	Elect Director Alex Gorsky	Mgmt	For	For	For
1h	Elect Director Melody Hobson	Mgmt	For	For	For
1i	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1j	Elect Director Virginia M. Rometty	Mgmt	For	For	For
1k	Elect Director Brad D. Smith	Mgmt	For	For	For
1l	Elect Director Mark A. Weinberger	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	Require Independent Board Chair	SH	Against	For	For
5	Report on Social Impacts of Climate Transition Finance	SH	Against	Against	Against

McDonald's Corporation

Meeting Date: 05/20/2025	Country: USA	Ticker: MCD
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 580135101		

McDonald's Corporation

Shares Voted: 66,460

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony Capuano	Mgmt	For	For	For
1b	Elect Director Kareem Daniel	Mgmt	For	For	For
1c	Elect Director Lloyd Dean	Mgmt	For	For	For
1d	Elect Director Catherine Engelbert	Mgmt	For	For	For
1e	Elect Director Margaret Georgiadis	Mgmt	For	For	For
1f	Elect Director Michael Hsu	Mgmt	For	For	For
1g	Elect Director Christopher Kempczinski	Mgmt	For	For	For
1h	Elect Director Jennifer Taubert	Mgmt	For	For	For
1i	Elect Director Paul Walsh	Mgmt	For	For	For
1j	Elect Director Amy Weaver	Mgmt	For	For	For
1k	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	Report on Risks of Discriminating Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against
5	Disclose an Assessment of Current Climate Transition Plans	SH	Against	Against	Against
6	Consider Eliminating DEI Goals from Compensation Plan Incentives	SH	Against	Against	Against

Shell Plc

Meeting Date: 05/20/2025Country: United KingdomTicker: SHEL

Record Date: 04/09/2025Meeting Type: Annual

Primary Security ID: G80827101

Shares Voted: 297,422

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Meeting for ADR Holders	Mgmt			
	Management Proposals	Mgmt			

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Accept Financial Statements and Statutory Reports	Mgmt	For	For	For
2	Approve Remuneration Report	Mgmt	For	For	For
3	Re-elect Dick Boer as Director	Mgmt	For	For	For
4	Re-elect Neil Carson as Director	Mgmt	For	For	For
5	Re-elect Ann Godbehere as Director	Mgmt	For	For	For
6	Re-elect Sinead Gorman as Director	Mgmt	For	For	For
7	Re-elect Jane Lute as Director	Mgmt	For	For	For
8	Re-elect Catherine Hughes as Director	Mgmt	For	For	For
9	Re-elect Sir Andrew Mackenzie as Director	Mgmt	For	For	For
10	Re-elect Sir Charles Roxburgh as Director	Mgmt	For	For	For
11	Re-elect Wael Sawan as Director	Mgmt	For	For	For
12	Re-elect Abraham Schot as Director	Mgmt	For	For	For
13	Re-elect Leena Srivastava as Director	Mgmt	For	For	For
14	Re-elect Cyrus Taraporevala as Director	Mgmt	For	For	For
15	Reappoint Ernst & Young LLP as Auditors	Mgmt	For	For	For
16	Authorise the Audit and Risk Committee to Fix Remuneration of Auditors	Mgmt	For	For	For
17	Authorise Issue of Equity	Mgmt	For	For	For
18	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
19	Authorise Market Purchase of Ordinary Shares	Mgmt	For	For	For
20	Authorise Off-Market Purchase of Ordinary Shares	Mgmt	For	For	For
21	Authorise UK Political Donations and Expenditure	Mgmt	For	For	For
	Shareholder Proposal	Mgmt			

Shell Plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
22	Request Company Disclose Whether and How Its: Demand Forecast For LNG; LNG Production And Sales Targets; And New Capital Expenditure In Natural Gas Assets; Are Consistent With Climate Commitments, Including Target To Reach Net Zero Emissions By 2025	SH	Against	Against	Against

Verizon Communications Inc.

Meeting Date: 05/22/2025	Country: USA	Ticker: VZ
Record Date: 03/24/2025	Meeting Type: Annual	
Primary Security ID: 92343V104		

Shares Voted: 411,863

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 Vittorio Colao	Mgmt	For	For	For
1.5	Elect Director Caroline Litchfield	Mgmt	For	For	For
1.6	Elect Director Laxman Narasimhan	Mgmt	For	For	For
1.7	Elect Director Clarence Otis, Jr.	Mgmt	For	For	For
1.8	Elect Director Daniel Schulman	Mgmt	For	For	For
1.9	Elect Director Carol Tome	Mgmt	For	For	For
1.10	Elect Director Hans Vestberg	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 Climate Lobbying	SH	Against	Against	Against
5	Report on Potential Hazards of Lead Cables and Potential Remediation Costs	SH	Against	Against	Against
6	Report on Risks Related to Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against	Against

UnitedHealth Group Incorporated

Meeting Date: 06/02/2025

Country: USA

Ticker: UNH

Record Date: 04/04/2025

Meeting Type: Annual

Primary Security ID: 91324P102

Shares Voted: 36,552

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	For	For	For
1b	Elect Director Timothy Flynn	Mgmt	For	For	For
1c	Elect Director Paul Garcia	Mgmt	For	For	For
1d	Elect Director Kristen Gil	Mgmt	For	For	For
1e	Elect Director Stephen Hemsley	Mgmt	For	For	For
1f	Elect Director Michele Hooper	Mgmt	For	For	For
1g	Elect Director F. William McNabb, III	Mgmt	For	For	For
1h	Elect Director Valerie Montgomery Rice	Mgmt	For	For	For
1i	Elect Director John Noseworthy	Mgmt	For	For	For
1j	Elect Director Andrew Witty *Withdrawn Resolution*	Mgmt			
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against

Walmart Inc.

Meeting Date: 06/05/2025

Country: USA

Ticker: WMT

Record Date: 04/11/2025

Meeting Type: Annual

Primary Security ID: 931142103

Shares Voted: 201,866

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Cesar Conde	Mgmt	For	For	For
1b	Elect Director Timothy P. Flynn	Mgmt	For	For	For
1c	Elect Director Sarah J. Friar	Mgmt	For	For	For
1d	Elect Director Carla A. Harris	Mgmt	For	For	For
1e	Elect Director Thomas W. Horton	Mgmt	For	For	For
1f	Elect Director Marissa A. Mayer	Mgmt	For	For	For

Walmart Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director C. Douglas McMillon	Mgmt	For	For	For
1h	Elect Director Robert E. Moritz, Jr.	Mgmt	For	For	For
1i	Elect Director Brian Niccol	Mgmt	For	For	For
1j	Elect Director Gregory B. Penner	Mgmt	For	For	For
1k	Elect Director Randall L. Stephenson	Mgmt	For	For	For
1l	Elect Director Steuart L. Walton	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	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Commission Third Party Assessment on Policies Regarding Law Enforcement Information Requests Related to Medication Use	SH	Against	Against	Against
6	Report on Reduction of Plastic Packaging and Recyclability Claims	SH	Against	Against	Against
7	Revisit Plastic Packaging Policies	SH	Against	Against	Against
8	Conduct and Report a Third-Party Racial Equity Audit	SH	Against	Against	Against
9	Report on Delays in Revising Diversity, Equity, and Inclusion (DEI) Initiatives	SH	Against	Against	Against
10	Report on Health and Safety Governance	SH	Against	Against	Against
11	Report on Risks of Discriminating Based on Religious and Political Views	SH	Against	Against	Against

Alphabet Inc.

Meeting Date: 06/06/2025

Record Date: 04/08/2025

Primary Security ID: 02079K305

Country: USA

Meeting Type: Annual

Ticker: GOOGL

Shares Voted: 98,896

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Larry Page	Mgmt	For	Against	Against

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
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	Against	Against
1e	Elect Director Frances H. Arnold	Mgmt	For	Against	Against
1f	Elect Director R. Martin "Marty" Chavez	Mgmt	For	For	For
1g	Elect Director L. John Doerr	Mgmt	For	Against	Against
1h	Elect Director Roger W. Ferguson, Jr.	Mgmt	For	For	For
1i	Elect Director K. Ram Shriram	Mgmt	For	Against	Against
1j	Elect Director Robin L. Washington	Mgmt	For	Against	Against
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Provide Right to Act by Written Consent	SH	Against	Against	Against
4	Adjust Executive Compensation Metrics for Share Buybacks	SH	Against	Against	Against
5	Report on Discrimination in Charitable Contributions	SH	Against	Against	Against
6	Consider Ending Participation in Human Rights Campaign's Corporate Equality Index	SH	Against	Against	Against
7	Report on Meeting 2030 Climate Goals	SH	Against	Against	Against
8	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
9	Report on Due Diligence Process to Assess Human Rights Risks in High-Risk Countries	SH	Against	Against	Against
10	Report on Risks of Discrimination in GenAI	SH	Against	Against	Against
11	Report on Risks of Improper Use of External Data in Development of AI Products	SH	Against	For	For
12	Publish a Human Rights Impact Assessment of AI Driven Targeted Advertising	SH	Against	For	For
13	Report on Lobbying and Child Safety Online	SH	Against	Against	Against
14	Adopt Metrics Evaluating YouTube Child Safety Policies	SH	Against	Against	Against

Meeting Date: 06/11/2025

Record Date: 04/14/2025

Primary Security ID: 149123101

Country: USA

Meeting Type: Annual

Ticker: CAT

Shares Voted: 53,015

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Joseph E. Creed	Mgmt	For	For	For
1.2	Elect Director James C. Fish, Jr.	Mgmt	For	For	For
1.3	Elect Director Gerald Johnson	Mgmt	For	For	For
1.4	Elect Director Nazzic S. Keene	Mgmt	For	For	For
1.5	Elect Director David W. MacLennan	Mgmt	For	For	For
1.6	Elect Director Judith F. Marks	Mgmt	For	For	For
1.7	Elect Director Debra L. Reed-Klages	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
1.10	Elect Director Rayford Wilkins, Jr.	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 a Civil Rights Audit	SH	Against	Against	Against
5	Report on Religious Discrimination in Charitable Contributions	SH	Against	Against	Against
6	Consider Abolishing DEI Policies, Departments, and Goals	SH	Against	Against	Against