

VOTE SUMMARY REPORT

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

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): HARVEST INDUSTRIAL LEADERS INCOME ETF

Parker-Hannifin Corporation

Meeting Date: 10/23/2024Country: USATicker: PH

Record Date: 09/06/2024Meeting Type: Annual

Primary Security ID: 701094104

Shares Voted: 1,895

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Denise Russell Fleming	Mgmt	For	For	For
1b	Elect Director Lance M. Fritz	Mgmt	For	For	For
1c	Elect Director Linda A. Harty	Mgmt	For	For	For
1d	Elect Director Kevin A. Lobo	Mgmt	For	For	For
1e	Elect Director Jennifer A. Parmentier	Mgmt	For	For	For
1f	Elect Director E. Jean Savage	Mgmt	For	For	For
1g	Elect Director Joseph Scaminace	Mgmt	For	For	For
1h	Elect Director Laura K. Thompson	Mgmt	For	For	For
1i	Elect Director James R. Verrier	Mgmt	For	For	For
1j	Elect Director James L. Wainscott	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

Copart, Inc.

Meeting Date: 12/06/2024Country: USATicker: CPRT

Record Date: 10/11/2024Meeting Type: Annual

Primary Security ID: 217204106

Shares Voted: 22,143

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Willis J. Johnson	Mgmt	For	For	For
1.2	Elect Director A. Jayson Adair	Mgmt	For	For	For
1.3	Elect Director Matt Blunt	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.4	Elect Director Steven D. Cohan	Mgmt	For	For	For
1.5	Elect Director Daniel J. Englander	Mgmt	For	For	For
1.6	Elect Director James E. Meeks	Mgmt	For	For	For
1.7	Elect Director Thomas N. Tryforos	Mgmt	For	For	For
1.8	Elect Director Diane M. Morefield	Mgmt	For	For	For
1.9	Elect Director Stephen Fisher	Mgmt	For	For	For
1.10	Elect Director Cherylyn Harley LeBon	Mgmt	For	For	For
1.11	Elect Director Carl D. Sparks	Mgmt	For	For	For
1.12	Elect Director Jeffrey Liaw	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

Eaton Corporation plc

Meeting Date: 04/23/2025	Country: Ireland	Ticker: ETN
Record Date: 02/25/2025	Meeting Type: Annual	
Primary Security ID: G29183103		

Shares Voted: 5,037

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Craig Arnold	Mgmt	For	For	For
1b	Elect Director Silvio Napoli	Mgmt	For	For	For
1c	Elect Director Gregory R. Page	Mgmt	For	For	For
1d	Elect Director Sandra Pianalto	Mgmt	For	For	For
1e	Elect Director Robert V. Pragada	Mgmt	For	For	For
1f	Elect Director Paulo Ruiz	Mgmt	For	For	For
1g	Elect Director Lori J. Ryerkerk	Mgmt	For	For	For
1h	Elect Director Andre Schulten	Mgmt	For	For	For
1i	Elect Director Gerald B. Smith	Mgmt	For	For	For
1j	Elect Director Karenann Terrell	Mgmt	For	For	For
1k	Elect Director Dorothy C. Thompson	Mgmt	For	For	For

Eaton Corporation plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1l	Elect Director Darryl L. Wilson	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors and Authorize Their Remuneration	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Authorize Issue of Equity with Pre-emptive Rights	Mgmt	For	For	For
5	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For	For
6	Authorize Share Repurchase of Issued Share Capital	Mgmt	For	For	For

Textron Inc.

Meeting Date: 04/23/2025

Record Date: 02/24/2025

Primary Security ID: 883203101

Country: USA

Meeting Type: Annual

Ticker: TXT

Shares Voted: 22,597

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard F. Ambrose	Mgmt	For	For	For
1b	Elect Director Kathleen M. Bader	Mgmt	For	For	For
1c	Elect Director R. Kerry Clark	Mgmt	For	For	For
1d	Elect Director Scott C. Donnelly	Mgmt	For	For	For
1e	Elect Director Michael X. Garrett	Mgmt	For	For	For
1f	Elect Director Deborah Lee James	Mgmt	For	For	For
1g	Elect Director Thomas A. Kennedy	Mgmt	For	For	For
1h	Elect Director Rob Mionis	Mgmt	For	For	For
1i	Elect Director Lionel L. Nowell III	Mgmt	For	For	For
1j	Elect Director Maria T. Zuber	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

Fastenal Company

Meeting Date: 04/24/2025

Record Date: 02/24/2025

Primary Security ID: 311900104

Country: USA

Meeting Type: Annual

Ticker: FAST

Shares Voted: 22,810

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Scott A. Satterlee	Mgmt	For	For	For
1b	Elect Director Michael J. Ancius	Mgmt	For	For	For
1c	Elect Director Stephen L. Eastman	Mgmt	For	For	For
1d	Elect Director Brady D. Ericson	Mgmt	For	For	For
1e	Elect Director Daniel L. Florness	Mgmt	For	For	For
1f	Elect Director Rita J. Heise	Mgmt	For	For	For
1g	Elect Director Hsenghung Sam Hsu	Mgmt	For	For	For
1h	Elect Director Daniel L. Johnson	Mgmt	For	For	For
1i	Elect Director Sarah N. Nielsen	Mgmt	For	For	For
1j	Elect Director Irene A. Quarshie	Mgmt	For	For	For
1k	Elect Director Reyne K. Wisecup	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

PACCAR Inc

Meeting Date: 04/29/2025

Record Date: 03/04/2025

Primary Security ID: 693718108

Country: USA

Meeting Type: Annual

Ticker: PCAR

Shares Voted: 16,201

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mark C. Pigott	Mgmt	For	For	For
1.2	Elect Director Pierre R. Breber	Mgmt	For	For	For
1.3	Elect Director Dame Alison J. Carnwath	Mgmt	For	For	For
1.4	Elect Director R. Preston Feight	Mgmt	For	For	For
1.5	Elect Director Kirk S. Hachigian	Mgmt	For	For	For

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.6	Elect Director Brice A. Hill	Mgmt	For	For	For
1.7	Elect Director Barbara B. Hult	Mgmt	For	For	For
1.8	Elect Director Cynthia A. Niekamp	Mgmt	For	For	For
1.9	Elect Director John M. Pigott	Mgmt	For	For	For
1.10	Elect Director Luiz A. S. Pretti	Mgmt	For	For	For
1.11	Elect Director Ganesh Ramaswamy	Mgmt	For	For	For
1.12	Elect Director Mark A. Schulz	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	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For

Canadian Pacific Kansas City Limited

Meeting Date: 04/30/2025Country: CanadaTicker: CP

Record Date: 03/10/2025Meeting Type: Annual/Special

Primary Security ID: 13646K108

Shares Voted: 24,270

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
2	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
3	Management Advisory Vote on Climate Change	Mgmt	For	For	For
4	Approve Amendments to Advance Notice Requirement	Mgmt	For	Against	Against
5.1	Elect Director John Baird	Mgmt	For	For	For
5.2	Elect Director Isabelle Courville	Mgmt	For	For	For
5.3	Elect Director Keith E. Creel	Mgmt	For	For	For
5.4	Elect Director Antonio Garza	Mgmt	For	For	For
5.5	Elect Director Arturo Gutierrez Hernandez	Mgmt	For	For	For
5.6	Elect Director Edward R. Hamberger	Mgmt	For	For	For
5.7	Elect Director Janet H. Kennedy	Mgmt	For	For	For

Canadian Pacific Kansas City Limited

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5.8	Elect Director Henry J. Maier	Mgmt	For	For	For
5.9	Elect Director Matthew H. Paull	Mgmt	For	For	For
5.10	Elect Director Jane L. Peverett	Mgmt	For	For	For
5.11	Elect Director Andrea Robertson	Mgmt	For	For	For
5.12	Elect Director Gordon T. Trafton	Mgmt	For	For	For

RTX Corporation

Meeting Date: 05/01/2025

Record Date: 03/04/2025

Primary Security ID: 75513E101

Country: USA

Meeting Type: Annual

Ticker: RTX

Shares Voted: 15,431

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Tracy A. Atkinson	Mgmt	For	For	For
1b	Elect Director Christopher T. Calio	Mgmt	For	For	For
1c	Elect Director Leanne G. Caret	Mgmt	For	For	For
1d	Elect Director Bernard A. Harris, Jr.	Mgmt	For	For	For
1e	Elect Director George R. Oliver	Mgmt	For	For	For
1f	Elect Director Ellen M. Pawlikowski	Mgmt	For	For	For
1g	Elect Director Denise L. Ramos	Mgmt	For	For	For
1h	Elect Director Fredric G. Reynolds	Mgmt	For	For	For
1i	Elect Director Brian C. Rogers	Mgmt	For	For	For
1j	Elect Director James A. Winnefeld, Jr.	Mgmt	For	For	For
1k	Elect Director Robert O. Work	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 Lobbying Payments and Policy	SH	Against	Against	Against

Uber Technologies, Inc.

Meeting Date: 05/05/2025

Country: USA

Ticker: UBER

Record Date: 03/13/2025

Meeting Type: Annual

Primary Security ID: 90353T100

Shares Voted: 22,817

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ronald Sugar	Mgmt	For	For	For
1b	Elect Director Revathi Advaiti	Mgmt	For	For	For
1c	Elect Director Turqi Alnowaiser	Mgmt	For	For	For
1d	Elect Director Ursula Burns	Mgmt	For	For	For
1e	Elect Director Robert Eckert	Mgmt	For	For	For
1f	Elect Director Amanda Ginsberg	Mgmt	For	For	For
1g	Elect Director Dara Khosrowshahi	Mgmt	For	For	For
1h	Elect Director John Thain	Mgmt	For	For	For
1i	Elect Director David Trujillo	Mgmt	For	For	For
1j	Elect Director Alexander Wynaendts	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

GE Aerospace

Meeting Date: 05/06/2025

Country: USA

Ticker: GE

Record Date: 03/10/2025

Meeting Type: Annual

Primary Security ID: 369604301

Shares Voted: 10,820

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Stephen Angel	Mgmt	For	For	For
1b	Elect Director Sebastien Bazin	Mgmt	For	For	For
1c	Elect Director Margaret Billson	Mgmt	For	For	For
1d	Elect Director H. Lawrence Culp, Jr.	Mgmt	For	For	For
1e	Elect Director Thomas Enders	Mgmt	For	For	For
1f	Elect Director Edward Garden	Mgmt	For	For	For
1g	Elect Director Isabella Goren	Mgmt	For	For	For

GE Aerospace

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Thomas Horton	Mgmt	For	For	For
1i	Elect Director Catherine Lesjak	Mgmt	For	For	For
1j	Elect Director Darren McDew	Mgmt	For	For	For
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 (Change-in-Control) to Shareholder Vote	SH	Against	Against	Against

AMETEK, Inc.

Meeting Date: 05/07/2025

Record Date: 03/10/2025

Primary Security ID: 031100100

Country: USA

Meeting Type: Annual

Ticker: AME

Shares Voted: 9,563

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Dean Seavers	Mgmt	For	For	For
1b	Elect Director David A. Zapico	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

General Dynamics Corporation

Meeting Date: 05/07/2025

Record Date: 03/12/2025

Primary Security ID: 369550108

Country: USA

Meeting Type: Annual

Ticker: GD

Shares Voted: 6,790

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Richard D. Clarke	Mgmt	For	For	For
1b	Elect Director Rudy F. deLeon	Mgmt	For	For	For
1c	Elect Director Cecil D. Haney	Mgmt	For	For	For
1d	Elect Director Charles W. Hooper	Mgmt	For	For	For

General Dynamics Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Mark M. Malcolm	Mgmt	For	For	For
1f	Elect Director James N. Mattis	Mgmt	For	For	For
1g	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1h	Elect Director C. Howard Nye	Mgmt	For	For	For
1i	Elect Director Catherine B. Reynolds	Mgmt	For	For	For
1j	Elect Director Laura J. Schumacher	Mgmt	For	For	For
1k	Elect Director Robert K. Steel	Mgmt	For	For	For
1l	Elect Director John G. Stratton	Mgmt	For	For	For
1m	Elect Director Peter A. Wall	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	Report on Human Rights Impact Assessment	SH	Against	Against	Against

Union Pacific Corporation

Meeting Date: 05/08/2025	Country: USA	Ticker: UNP
Record Date: 03/14/2025	Meeting Type: Annual	
Primary Security ID: 907818108		

Shares Voted: 7,918

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director David B. Dillon	Mgmt	For	For	For
1b	Elect Director Sheri H. Edison	Mgmt	For	For	For
1c	Elect Director Teresa M. Finley	Mgmt	For	For	For
1d	Elect Director Deborah C. Hopkins	Mgmt	For	For	For
1e	Elect Director Jane H. Lute	Mgmt	For	For	For
1f	Elect Director Michael R. McCarthy	Mgmt	For	For	For
1g	Elect Director Doyle R. Simons	Mgmt	For	For	For
1h	Elect Director John K. Tien, Jr.	Mgmt	For	For	For
1i	Elect Director V. James Vena	Mgmt	For	For	For
1j	Elect Director John P. Wiehoff	Mgmt	For	For	For

Union Pacific Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1k	Elect Director Christopher J. Williams	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 Clawback Policy	SH	Against	Against	Against

United Parcel Service, Inc.

Meeting Date: 05/08/2025	Country: USA	Ticker: UPS
Record Date: 03/10/2025	Meeting Type: Annual	
Primary Security ID: 911312106		

Shares Voted: 14,177

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Rodney Adkins	Mgmt	For	For	For
1b	Elect Director Eva Boratto	Mgmt	For	For	For
1c	Elect Director Kevin Clark	Mgmt	For	For	For
1d	Elect Director Wayne Hewett	Mgmt	For	For	For
1e	Elect Director Angela Hwang	Mgmt	For	For	For
1f	Elect Director Kate Johnson	Mgmt	For	Against	Against
1g	Elect Director William Johnson	Mgmt	For	Against	Against
1h	Elect Director Franck Moison	Mgmt	For	Against	Against
1i	Elect Director Christiana Smith Shi	Mgmt	For	For	For
1j	Elect Director Russell Stokes	Mgmt	For	Against	Against
1k	Elect Director Carol B. Tome	Mgmt	For	For	For
1l	Elect Director Kevin M. Warsh	Mgmt	For	Against	Against
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	Approve Recapitalization Plan for all Stock to Have One-vote per Share	SH	Against	For	For
5	Report on Risks Arising from Voluntary Carbon-Reduction Commitments	SH	Against	Against	Against

United Rentals, Inc.

Meeting Date: 05/08/2025

Record Date: 03/10/2025

Primary Security ID: 911363109

Country: USA

Meeting Type: Annual

Ticker: URI

Shares Voted: 2,363

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Julie M. Heuer Brandt	Mgmt	For	For	For
1b	Elect Director Marc A. Bruno	Mgmt	For	For	For
1c	Elect Director Larry D. De Shon	Mgmt	For	For	For
1d	Elect Director Matthew J. Flannery	Mgmt	For	For	For
1e	Elect Director Kim Harris Jones	Mgmt	For	For	For
1f	Elect Director Terri L. Kelly	Mgmt	For	For	For
1g	Elect Director Michael J. Kneeland	Mgmt	For	For	For
1h	Elect Director Francisco J. Lopez-Balboa	Mgmt	For	For	For
1i	Elect Director Gracia C. Martore	Mgmt	For	For	For
1j	Elect Director Shiv Singh	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	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Against	Against	Against

Lockheed Martin Corporation

Meeting Date: 05/09/2025

Record Date: 02/28/2025

Primary Security ID: 539830109

Country: USA

Meeting Type: Annual

Ticker: LMT

Shares Voted: 3,725

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John C. Aquilino	Mgmt	For	For	For
1.2	Elect Director David B. Burritt	Mgmt	For	For	For
1.3	Elect Director John M. Donovan	Mgmt	For	For	For
1.4	Elect Director Joseph F. Dunford, Jr.	Mgmt	For	For	For

Lockheed Martin Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Thomas J. Falk	Mgmt	For	For	For
1.6	Elect Director Vicki A. Hollub	Mgmt	For	For	For
1.7	Elect Director Debra L. Reed-Klages	Mgmt	For	For	For
1.8	Elect Director James D. Taiclet	Mgmt	For	For	For
1.9	Elect Director Heather A. Wilson	Mgmt	For	For	For
1.10	Elect Director Patricia E. Yarrington	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	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For
5	Report on Alignment of Political Activities with Company's Human Rights Policy	SH	Against	Against	Against
6	Report on Risks of DEI Requirements in Hiring and Recruitment *Withdrawn Resolution*	SH			

Republic Services, Inc.

Meeting Date: 05/19/2025Country: USATicker: RSG

Record Date: 03/24/2025Meeting Type: Annual

Primary Security ID: 760759100

Shares Voted: 8,953

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Manny Kadre	Mgmt	For	For	For
1b	Elect Director Michael A. Duffy	Mgmt	For	For	For
1c	Elect Director Thomas W. Handley	Mgmt	For	For	For
1d	Elect Director Jennifer M. Kirk	Mgmt	For	For	For
1e	Elect Director Michael Larson	Mgmt	For	For	For
1f	Elect Director Norman Thomas Linebarger	Mgmt	For	For	For
1g	Elect Director Meg Reynolds	Mgmt	For	For	For
1h	Elect Director James P. Snee	Mgmt	For	For	For

Republic Services, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1i	Elect Director Brian S. Tyler	Mgmt	For	For	For
1j	Elect Director Jon Vander Ark	Mgmt	For	For	For
1k	Elect Director Sandra M. Volpe	Mgmt	For	For	For
1l	Elect Director Katharine B. Weymouth	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

Caterpillar, Inc.

Meeting Date: 06/11/2025

Record Date: 04/14/2025

Primary Security ID: 149123101

Country: USA

Meeting Type: Annual

Ticker: CAT

Shares Voted: 5,291

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

Caterpillar, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Consider Abolishing DEI Policies, Departments, and Goals	SH	Against	Against	Against

Ingersoll Rand Inc.

Meeting Date: 06/12/2025Country: USATicker: IR

Record Date: 04/17/2025Meeting Type: Annual

Primary Security ID: 45687V106

Shares Voted: 22,197

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Vicente Reynal	Mgmt	For	For	For
1b	Elect Director William P. Donnelly	Mgmt	For	For	For
1c	Elect Director Jennifer Hartsock	Mgmt	For	For	For
1d	Elect Director John Humphrey	Mgmt	For	For	For
1e	Elect Director Marc E. Jones	Mgmt	For	For	For
1f	Elect Director JoAnna L. Sohovich	Mgmt	For	For	For
1g	Elect Director Mark P. Stevenson	Mgmt	For	For	For
1h	Elect Director Michelle Swanenburg	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

Delta Air Lines, Inc.

Meeting Date: 06/19/2025Country: USATicker: DAL

Record Date: 04/25/2025Meeting Type: Annual

Primary Security ID: 247361702

Shares Voted: 39,012

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Edward H. Bastian	Mgmt	For	For	For
1b	Elect Director Christophe Beck	Mgmt	For	For	For
1c	Elect Director Maria Black	Mgmt	For	For	For

Delta Air Lines, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1d	Elect Director Willie CW Chiang	Mgmt	For	For	For
1e	Elect Director Greg Creed	Mgmt	For	For	For
1f	Elect Director David G. DeWalt	Mgmt	For	For	For
1g	Elect Director Leslie D. Hale	Mgmt	For	For	For
1h	Elect Director Christopher A. Hazleton	Mgmt	For	For	For
1i	Elect Director Michael P. Huerta	Mgmt	For	For	For
1j	Elect Director Judith J. McKenna	Mgmt	For	For	For
1k	Elect Director Vasant M. Prabhu	Mgmt	For	For	For
1l	Elect Director Sergio A. L. Rial	Mgmt	For	For	For
1m	Elect Director David S. Taylor	Mgmt	For	For	For
1n	Elect Director Kathy N. Waller	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	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
5	Provide Right to Act by Written Consent	SH	Against	For	For