

VOTE SUMMARY REPORT

Date range covered : 07/01/2023 to 06/30/2024

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): HARVEST US BANK
LEADERS INCOME ETF

Fifth Third Bancorp

Meeting Date: 04/16/2024 **Country:** USA **Ticker:** FITB
Record Date: 02/20/2024 **Meeting Type:** Annual
Primary Security ID: 316773100

Shares Voted: 152,542

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Nicholas K. Akins	Mgmt	For	For	For
1b	Elect Director B. Evan Bayh, III	Mgmt	For	For	For
1c	Elect Director Jorge L. Benitez	Mgmt	For	For	For
1d	Elect Director Katherine B. Blackburn	Mgmt	For	For	For
1e	Elect Director Emerson L. Brumback	Mgmt	For	For	For
1f	Elect Director Linda W. Clement-Holmes	Mgmt	For	For	For
1g	Elect Director C. Bryan Daniels	Mgmt	For	For	For
1h	Elect Director Laurent Desmangles	Mgmt	For	For	For
1i	Elect Director Mitchell S. Feiger	Mgmt	For	For	For
1j	Elect Director Thomas H. Harvey	Mgmt	For	For	For
1k	Elect Director Gary R. Heminger	Mgmt	For	For	For
1l	Elect Director Eileen A. Mallesch	Mgmt	For	For	For
1m	Elect Director Michael B. McCallister	Mgmt	For	For	For
1n	Elect Director Kathleen A. Rogers	Mgmt	For	For	For
1o	Elect Director Timothy N. Spence	Mgmt	For	For	For
1p	Elect Director Marsha C. 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	Approve Omnibus Stock Plan	Mgmt	For	For	For
5	Approve Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For

M&T Bank Corporation

Meeting Date: 04/16/2024 **Country:** USA **Ticker:** MTB
Record Date: 02/22/2024 **Meeting Type:** Annual
Primary Security ID: 55261F104

M&T Bank Corporation

Shares Voted: 36,809

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director John P. Barnes	Mgmt	For	For	For
1.2	Elect Director Robert T. Brady	Mgmt	For	For	For
1.3	Elect Director Carlton J. Charles	Mgmt	For	For	For
1.4	Elect Director Jane Chwick	Mgmt	For	For	For
1.5	Elect Director William F. Cruger, Jr.	Mgmt	For	For	For
1.6	Elect Director T. Jefferson Cunningham, III	Mgmt	For	For	For
1.7	Elect Director Gary N. Geisel	Mgmt	For	For	For
1.8	Elect Director Leslie V. Godridge	Mgmt	For	For	For
1.9	Elect Director Rene F. Jones	Mgmt	For	For	For
1.10	Elect Director Richard H. Ledgett, Jr.	Mgmt	For	For	For
1.11	Elect Director Melinda R. Rich	Mgmt	For	For	For
1.12	Elect Director Robert E. Sadler, Jr.	Mgmt	For	For	For
1.13	Elect Director Denis J. Salamone	Mgmt	For	For	For
1.14	Elect Director Rudina Seseri	Mgmt	For	For	For
1.15	Elect Director Kirk W. Walters	Mgmt	For	For	For
1.16	Elect Director Herbert L. Washington	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

U.S. Bancorp

Meeting Date: 04/16/2024

Country: USA

Ticker: USB

Record Date: 02/20/2024

Meeting Type: Annual

Primary Security ID: 902973304

Shares Voted: 117,804

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Warner L. Baxter	Mgmt	For	For	For
1b	Elect Director Dorothy J. Bridges	Mgmt	For	For	For
1c	Elect Director Elizabeth L. Buse	Mgmt	For	For	For
1d	Elect Director Andrew Cecere	Mgmt	For	For	For
1e	Elect Director Alan B. Colberg	Mgmt	For	For	For

U.S. Bancorp

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Kimberly N. Ellison-Taylor	Mgmt	For	For	For
1g	Elect Director Kimberly J. Harris	Mgmt	For	For	For
1h	Elect Director Roland A. Hernandez	Mgmt	For	For	For
1i	Elect Director Richard P. McKenney	Mgmt	For	For	For
1j	Elect Director Yusuf I. Mehdi	Mgmt	For	For	For
1k	Elect Director Loretta E. Reynolds	Mgmt	For	For	For
1l	Elect Director John P. Wiehoff	Mgmt	For	For	For
1m	Elect Director Scott W. Wine	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	Approve Omnibus Stock Plan	Mgmt	For	For	For

Huntington Bancshares Incorporated

Meeting Date: 04/17/2024 **Country:** USA **Ticker:** HBAN
Record Date: 02/14/2024 **Meeting Type:** Annual
Primary Security ID: 446150104

Shares Voted: 417,875

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alanna Y. Cotton	Mgmt	For	For	For
1.2	Elect Director Ann B. (Tanny) Crane	Mgmt	For	For	For
1.3	Elect Director Rafael Andres Diaz-Granados	Mgmt	For	For	For
1.4	Elect Director Gina D. France	Mgmt	For	For	For
1.5	Elect Director J. Michael Hochschwender	Mgmt	For	For	For
1.6	Elect Director John C. (Chris) Inglis	Mgmt	For	For	For
1.7	Elect Director Richard H. King	Mgmt	For	For	For
1.8	Elect Director Katherine M. A. (Allie) Kline	Mgmt	For	For	For
1.9	Elect Director Richard W. Neu	Mgmt	For	For	For
1.10	Elect Director Kenneth J. Phelan	Mgmt	For	For	For
1.11	Elect Director David L. Porteous	Mgmt	For	For	For
1.12	Elect Director Teresa H. Shea	Mgmt	For	For	For
1.13	Elect Director Roger J. Sit	Mgmt	For	For	For
1.14	Elect Director Stephen D. Steinour	Mgmt	For	For	For

Huntington Bancshares Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.15	Elect Director Jeffrey L. Tate	Mgmt	For	For	For
1.16	Elect Director Gary Torgow	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	Approve Omnibus Stock Plan	Mgmt	For	For	For

Regions Financial Corporation

Meeting Date: 04/17/2024 **Country:** USA **Ticker:** RF
Record Date: 02/20/2024 **Meeting Type:** Annual
Primary Security ID: 7591EP100

Shares Voted: 273,658

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Mark A. Crosswhite	Mgmt	For	For	For
1b	Elect Director Noopur Davis	Mgmt	For	For	For
1c	Elect Director Zhanna Golodryga	Mgmt	For	For	For
1d	Elect Director J. Thomas Hill	Mgmt	For	For	For
1e	Elect Director Joia M. Johnson	Mgmt	For	For	For
1f	Elect Director Ruth Ann Marshall	Mgmt	For	For	For
1g	Elect Director James T. Prokopanko	Mgmt	For	For	For
1h	Elect Director Alison S. Rand	Mgmt	For	For	For
1i	Elect Director William C. Rhodes, III	Mgmt	For	For	For
1j	Elect Director Lee J. Styslinger, III	Mgmt	For	For	For
1k	Elect Director Jose S. Suquet	Mgmt	For	For	For
1l	Elect Director John M. Turner, Jr.	Mgmt	For	For	For
1m	Elect Director Timothy Vines	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	Advisory Vote on Say on Pay Frequency	Mgmt	One Year	One Year	One Year
5	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

Truist Financial Corporation

Meeting Date: 04/23/2024

Country: USA

Ticker: TFC

Record Date: 02/15/2024

Meeting Type: Annual

Primary Security ID: 89832Q109

Shares Voted: 146,364

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jennifer S. Banner	Mgmt	For	For	For
1b	Elect Director K. David Boyer, Jr.	Mgmt	For	For	For
1c	Elect Director Agnes Bundy Scanlan	Mgmt	For	For	For
1d	Elect Director Dallas S. Clement	Mgmt	For	For	For
1e	Elect Director Patrick C. Graney, III	Mgmt	For	For	For
1f	Elect Director Linnie M. Haynesworth	Mgmt	For	For	For
1g	Elect Director Donna S. Morea	Mgmt	For	For	For
1h	Elect Director Charles A. Patton	Mgmt	For	For	For
1i	Elect Director William H. Rogers, Jr	Mgmt	For	For	For
1j	Elect Director Thomas E. Skains	Mgmt	For	For	For
1k	Elect Director Laurence Stein	Mgmt	For	For	For
1l	Elect Director Bruce L. Tanner	Mgmt	For	For	For
1m	Elect Director Steven C. Voorhees	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	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

Bank of America Corporation

Meeting Date: 04/24/2024

Country: USA

Ticker: BAC

Record Date: 03/01/2024

Meeting Type: Annual

Primary Security ID: 060505104

Shares Voted: 155,570

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 Jose (Joe) E. Almeida	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

Bank of America Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
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 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	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against
6	Report on Climate Lobbying	SH	Against	For	For
7	Report on Clean Energy Supply Financing Ratio	SH	Against	For	For
8	Provide Right to Act by Written Consent	SH	Against	Against	Against
9	Require Independent Board Chair	SH	Against	For	For
10	Improve Executive Compensation Program and Policy	SH	Against	Against	Against

The Goldman Sachs Group, Inc.

Meeting Date: 04/24/2024 **Country:** USA **Ticker:** GS
Record Date: 02/26/2024 **Meeting Type:** Annual
Primary Security ID: 38141G104

Shares Voted: 13,790

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michele Burns	Mgmt	For	For	For
1b	Elect Director Mark Flaherty	Mgmt	For	For	For
1c	Elect Director Kimberley Harris	Mgmt	For	For	For
1d	Elect Director Kevin Johnson	Mgmt	For	For	For
1e	Elect Director Ellen Kullman	Mgmt	For	For	For
1f	Elect Director Lakshmi Mittal	Mgmt	For	For	For

The Goldman Sachs Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1g	Elect Director Thomas Montag	Mgmt	For	For	For
1h	Elect Director Peter Oppenheimer	Mgmt	For	For	For
1i	Elect Director David Solomon	Mgmt	For	For	For
1j	Elect Director Jan Tighe	Mgmt	For	For	For
1k	Elect Director David Viniar	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 Lobbying Payments and Policy	SH	Against	For	For
6	Report on Efforts to Prevent Discrimination	SH	Against	Against	Against
7	Issue Environmental Justice Report	SH	Against	Against	Against
8	Report on Clean Energy Supply Financing Ratio	SH	Against	For	For
9	Review Proxy Voting Record and Policies Related to Climate Change and Diversity	SH	Against	Against	Against
10	Restrict spending on climate change-related analysis or actions	SH	Against	Against	Against
11	Report on Pay Equity	SH	Against	For	For
12	Adopt Director Election Resignation Bylaw *Withdrawn Resolution*	SH			

The PNC Financial Services Group, Inc.

Meeting Date: 04/24/2024

Country: USA

Ticker: PNC

Record Date: 02/02/2024

Meeting Type: Annual

Primary Security ID: 693475105

Shares Voted: 34,556

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Joseph Alvarado	Mgmt	For	For	For
1b	Elect Director Debra A. Cafaro	Mgmt	For	For	For
1c	Elect Director Marjorie Rodgers Cheshire	Mgmt	For	For	For
1d	Elect Director William S. Demchak	Mgmt	For	For	For
1e	Elect Director Andrew T. Feldstein	Mgmt	For	For	For
1f	Elect Director Richard J. Harshman	Mgmt	For	For	For
1g	Elect Director Daniel R. Hesse	Mgmt	For	For	For

The PNC Financial Services Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1h	Elect Director Renu Khator	Mgmt	For	For	For
1i	Elect Director Linda R. Medler	Mgmt	For	For	For
1j	Elect Director Robert A. Niblock	Mgmt	For	For	For
1k	Elect Director Martin Pfinsgraff	Mgmt	For	For	For
1l	Elect Director Bryan S. Salesky	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	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Report on Risk Management and Implementation of Human Rights Statement	SH	Against	Against	Against

Citizens Financial Group, Inc.

Meeting Date: 04/25/2024 **Country:** USA **Ticker:** CFG
Record Date: 02/28/2024 **Meeting Type:** Annual
Primary Security ID: 174610105

Shares Voted: 169,333

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Bruce Van Saun	Mgmt	For	For	For
1.2	Elect Director Lee Alexander	Mgmt	For	For	For
1.3	Elect Director Tracy A. Atkinson	Mgmt	For	For	For
1.4	Elect Director Christine M. Cumming	Mgmt	For	For	For
1.5	Elect Director Kevin J. Cummings	Mgmt	For	For	For
1.6	Elect Director William P. Hankowsky	Mgmt	For	For	For
1.7	Elect Director Edward J. Kelly, III	Mgmt	For	For	For
1.8	Elect Director Robert G. Leary	Mgmt	For	For	For
1.9	Elect Director Terrance J. Lillis	Mgmt	For	For	For
1.10	Elect Director Michele N. Siekerka	Mgmt	For	For	For
1.11	Elect Director Christopher J. Swift	Mgmt	For	For	For
1.12	Elect Director Wendy A. Watson	Mgmt	For	For	For
1.13	Elect Director Marita Zuraitis	Mgmt	For	For	For
2	Amend Non-Employee Director Omnibus Stock Plan	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against	Against

Citizens Financial Group, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Amend Omnibus Stock Plan	Mgmt	For	For	For
5	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For	For
6	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For

Citigroup Inc.

Meeting Date: 04/30/2024 **Country:** USA **Ticker:** C
Record Date: 03/04/2024 **Meeting Type:** Annual
Primary Security ID: 172967424

Shares Voted: 94,632

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Ellen M. Costello	Mgmt	For	For	For
1b	Elect Director Grace E. Dailey	Mgmt	For	For	For
1c	Elect Director Barbara J. Desoer	Mgmt	For	For	For
1d	Elect Director John C. Dugan	Mgmt	For	For	For
1e	Elect Director Jane N. Fraser	Mgmt	For	For	For
1f	Elect Director Duncan P. Hennes	Mgmt	For	For	For
1g	Elect Director Peter B. Henry	Mgmt	For	For	For
1h	Elect Director S. Leslie Ireland	Mgmt	For	For	For
1i	Elect Director Renee J. James	Mgmt	For	For	For
1j	Elect Director Gary M. Reiner	Mgmt	For	For	For
1k	Elect Director Diana L. Taylor	Mgmt	For	For	For
1l	Elect Director James S. Turley	Mgmt	For	For	For
1m	Elect Director Casper W. von Koskull	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	Amend Omnibus Stock Plan	Mgmt	For	Against	Against
5	Require Independent Board Chair	SH	Against	Against	Against
6	Report on Respecting Indigenous Peoples' Rights	SH	Against	For	For
7	Amend Director Election Resignation Bylaw *Withdrawn Resolution*	SH			
8	Report on Risks Created by the Company's Diversity, Equity, and Inclusion Efforts	SH	Against	Against	Against

Citigroup Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
9	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against
10	Disclose Board Oversight Regarding Material Risks Associated with Animal Welfare	SH	Against	Against	Against

Wells Fargo & Company

Meeting Date: 04/30/2024 **Country:** USA **Ticker:** WFC
Record Date: 03/04/2024 **Meeting Type:** Annual
Primary Security ID: 949746101

Shares Voted: 98,088

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
4	Opt Out of Section 203 of the Delaware General Corporation Law	Mgmt	For	For	For
5	Eliminate Supermajority Vote Requirement to Amend the Local Directors Provision	Mgmt	For	For	For
6	Report on Prevention of Workplace Harassment and Discrimination	SH	Against	For	For
7	Commission Third Party Assessment on Company's Commitment to Freedom of Association and Collective Bargaining Rights	SH	Against	For	For

Wells Fargo & Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
8	Report on Respecting Indigenous Peoples' Rights	SH	Against	For	For
9	Issue Audited Report on Climate Transition Policies	SH	Against	Against	Against
10	Report on Climate Lobbying	SH	Against	For	For
11	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	For	For
12	Report on Lobbying Payments and Policy	SH	Against	For	For
13	Report on Risks Related to Discrimination Against Individuals Including Religious/Political Views	SH	Against	Against	Against

First Citizens BancShares, Inc.

Meeting Date: 05/01/2024 **Country:** USA **Ticker:** FCNCA
Record Date: 03/04/2024 **Meeting Type:** Annual
Primary Security ID: 31946M103

Shares Voted: 3,467

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ellen R. Alemany	Mgmt	For	For	For
1.2	Elect Director John M. Alexander, Jr.	Mgmt	For	For	For
1.3	Elect Director Victor E. Bell, III	Mgmt	For	Withhold	Withhold
1.4	Elect Director Peter M. Bristow	Mgmt	For	For	For
1.5	Elect Director Hope H. Bryant	Mgmt	For	For	For
1.6	Elect Director Michael A. Carpenter	Mgmt	For	For	For
1.7	Elect Director H. Lee Durham, Jr.	Mgmt	For	Withhold	Withhold
1.8	Elect Director Eugene Flood, Jr.	Mgmt	For	For	For
1.9	Elect Director Frank B. Holding, Jr.	Mgmt	For	For	For
1.10	Elect Director Robert R. Hoppe	Mgmt	For	For	For
1.11	Elect Director David G. Leitch	Mgmt	For	For	For
1.12	Elect Director Robert E. Mason, IV	Mgmt	For	Withhold	Withhold
1.13	Elect Director Robert T. Newcomb	Mgmt	For	Withhold	Withhold
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Report on Overseeing Risks Related to Discrimination Including Religious/Political Views	SH	Against	Against	Against

JPMorgan Chase & Co.

Meeting Date: 05/21/2024

Country: USA

Ticker: JPM

Record Date: 03/22/2024

Meeting Type: Annual

Primary Security ID: 46625H100

Shares Voted: 29,455

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 Alicia Boler Davis	Mgmt	For	For	For
1e	Elect Director James Dimon	Mgmt	For	For	For
1f	Elect Director Alex Gorsky	Mgmt	For	For	For
1g	Elect Director Mellody Hobson	Mgmt	For	For	For
1h	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1i	Elect Director Virginia M. Rometty	Mgmt	For	For	For
1j	Elect Director Mark A. Weinberger	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 PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Require Independent Board Chair	SH	Against	For	For
6	Report on Impacts of JPMC's Climate Transition Policies	SH	Against	Against	Against
7	Report on Respecting Indigenous Peoples' Rights	SH	Against	For	For
8	Review Proxy Voting Record and Policies Related to Climate Change and Diversity	SH	Against	Against	Against
9	Commission Third Party Report on Due Diligence Process of Doing Business in Conflict Affected Areas	SH	Against	Against	Against
10	Submit Severance Agreement to Shareholder Vote	SH	Against	For	For
11	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against	Against

Morgan Stanley

Meeting Date: 05/23/2024

Country: USA

Ticker: MS

Record Date: 03/25/2024

Meeting Type: Annual

Primary Security ID: 617446448

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 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 Edward (Ted) Pick	Mgmt	For	For	For
1m	Elect Director Mary L. Schapiro	Mgmt	For	For	For
1n	Elect Director Perry M. Traquina	Mgmt	For	For	For
1o	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	Against	Against
4	Approve Nonqualified Employee Stock Purchase Plan	Mgmt	For	For	For
5	Report on Overseeing Risks Related to Discrimination Including Religious/Political Views	SH	Against	Against	Against
6	Report on Lobbying Payments and Policy	SH	Against	For	For
7	Report on Clean Energy Supply Financing Ratio	SH	Against	For	For