Stewardship Personal Values Portfolios®

SEASONS of ADVICE®
WEALTH MANAGEMENT
Stewardship Personal Values Portfolios®

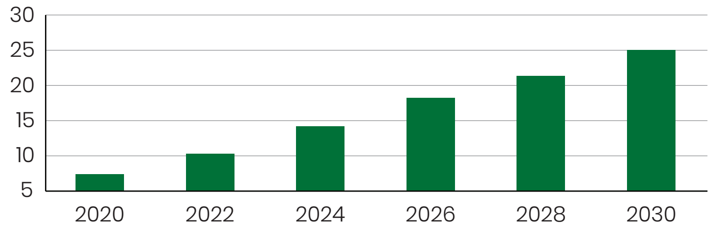
Our Investment Approach

The Stewardship Personal Value Portfolios are a diversified range of actively managed, multi-asset class model portfolios featuring enhanced ESG strategies. Utilizing a combination of mutual funds, ETFs and individual securities, the portfolio has been filtered for above-average or better Morningstar Direct® sustainability ratings, low or negligible carbon risk ratings, as well as an enhanced screening for controversial weapons, palm oil, small arms, thermal coal and tobacco. Candidate investments are further subjected to fundamental analysis before being added to the portfolio in compliance with Global Investment Performance Standards® (GIPS).

Growth of ESG Investing

The total market for ESG Investments is expected to reach $25 trillion by 2030.*

TOTAL ESG AUM ($ IN TRILLIONS)

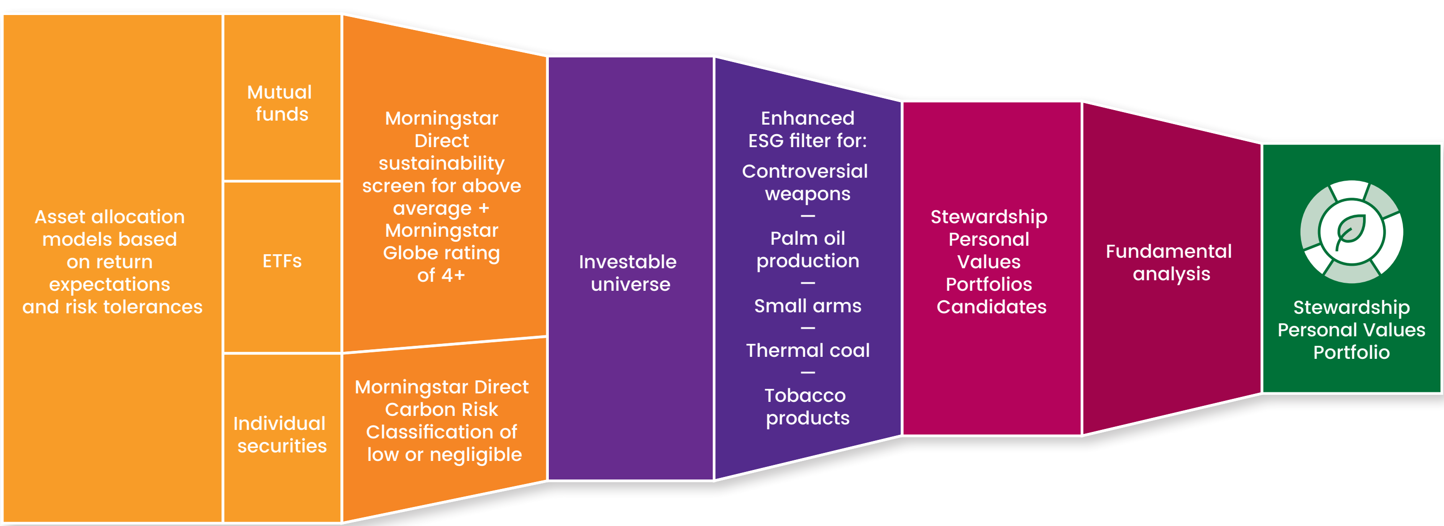


*Broadridge Global Market Intelligence, December 2021.

The Key Differentiators

Open architecture portfolio includes mutual funds, ETFs and individual securities.	Research through Morningstar Direct® — a global leader in ESG research and data
Asset-allocated portfolios that include a comprehensive range of asset classes and risk models	Access to a full range of investments screened for sustainability ratings and further enhanced by filtering for **carbon risk, controversial weapons, palm oil production, small arms, thermal coal** and **tobacco**
Ability to invest in custom-created structured notes based on a basket of ESG stock or indices	Dedicated investment team that regularly monitors the portfolios and individual investments for adherence to ESG mandates and performance relative to peers and benchmarks

A Disciplined Investment Approach



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Christopher Conigliaro, CFP®

President
CHIEF INVESTMENT OFFICER

About Seasons of Advice

Seasons of Advice Wealth Management is a signatory of the United Nations Principles of Responsible Investors, recognized as the leading global network of investors committed to integrating ESG considerations into their practice. Stewardship Personal Values Portfolios is an autonomous division of Seasons of Advice Wealth Management that is focused on ESG investing. Seasons of Advice Wealth Management regularly publishes thought leadership on ESG investing and is committed to offering investors the opportunity to "do well by doing good."

Notes

SOA Wealth Management — Stewardship Personal Values Portfolios® claims compliance with the Global Investment Performance Standards (GIPS®). GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.

To receive a GIPS report and/or our firm's list of composite descriptions please email your request to info@soawealth.com.

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Historical performance results for investment indices and/or categories generally do not reflect the deduction of transaction and/or custodial charges, the deductions of an investment management fee, nor the impact of taxes, the incurrence of which would have the effect of decreasing historical performance results.

The investment return and principal value of an investment will fluctuate; thus an investor's shares, when redeemed, may be worth more or less than their original cost.

Investment decisions always should be made based on the investor's specific financial needs and objectives, goals, time horizon, and risk tolerance.

The asset classes and/or investment strategies described may not be suitable for all investors, and investors should consult with an investment advisor to determine the appropriate investment strategy.

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