

JSP

Jackson Square Partners engages in responsible investing via our longstanding approach of analyzing both positive and negative externalities as part of a firm's Porter Five Forces competitive advantage profile as well as via our active ownership and engagement philosophy. While the mechanics of our process and the language we use have evolved over time, our investment philosophy has always relied on our understanding of key growth drivers, including an appreciation of the opportunity inherent in shared value creation, or conscious capitalism.

KEY ESG PRINCIPLES

ENVIRONMENTAL

A company should seek to minimize the carbon footprint and other ecological impacts of both its own business and that of its industry

SOCIAL

Best-in-class labor practices and a positive public and industry reputation are key for attracting top talent and therefore key for growth and competitive moat

GOVERNANCE

Management teams should have incentives aligned with investors over the medium and long term

2021 UPDATES

PROXY

- 901** In favor
- 84** Against
- 40** Abstained/Withheld

ENGAGEMENT

59 total esg engagement updates to date across 46 companies

E 46 **S** 46 **G** 58

ESG TIMELINE

Making the implicit consideration of material ESG factors an explicit part of our investment process

2018

- Internal ESG working group
- UN PRI signatory
- ESG specific engagement tracking

2019

- "ESG Risks & Opportunities" analytical template developed
- Began vetting potential holdings amongst internal ESG working group
- Increased ESG engagement with a focus on climate change
- SASB membership and framework adoption

2020

- Formalized ESG policy & framework
- Engagement to further ESG efforts and encourage alignment with the major reporting frameworks
- Completed ESG analysis on all investee companies

2021

- Promoted ESG research analyst
- TCFD supporter
- Determined climate impact assessment approach

Whats next?

Quantifying ESG impact on the cost of capital

Jackson Square was built around the same ESG principles we apply to portfolio companies. We believe sustainable growth requires a foundation of:

ALIGNMENT - through employee ownership and investment alongside clients in our products

MERITOCRATIC EGALITARIANISM - with our distinctive equity structure to attract, retain and motivate talent

EMPOWERMENT - via freedom and responsibility ethos, inclusion, and employee-directed engagement

CULTURE - emphasizing individual agency, integrity, curiosity, and collaboration

DIVERSITY STATISTICS

48% Women

52% Men

30% Minority & Underrepresented Groups

67% Diverse Hires in 2021

In the past year, we have made several changes to continue building on this strong cultural and structural base:

Pledge 1%: Raising our commitment to community to 1% of firm profits and formalizing our employee time grant for volunteering

Internship program: Successful pilot program targeting underrepresented groups

Diversity, Equity, & Inclusion Initiative: To enhance communication and codify best practices

2022 Partnership: nonprofits committed to serving underrepresented communities in the financial industry

The Street Smarts

Wall Street Bound

JACKSON SQUARE VOLUNTEER SPOTLIGHT



Zohair Rashid
ANALYST

The Citizens Foundation builds and operates schools for underprivileged children in Pakistan (where I was born and raised). I co-founded their New York Young Professionals Chapter and serve as head of fundraising. This chapter was meant to serve as a model for engaging millennials across the country. To-date, we've raised \$1+ million, engaged 1,000+ unique community members, and helped launch five other young professionals chapters.

In 2021 Jackson Square joined the Pledge 1% Movement, expanding and formalizing our commitment to integrated philanthropy

1% OF FIRM PROFIT

100% EMPLOYEE DIRECTED

\$7,000 PER EMPLOYEE
HALF VIA 2:1 MATCH
HALF GRANTED

100+ NON-PROFITS SUPPORTED

\$820,000 DONATED TO DATE

1% OF EMPLOYEE TIME COMMITTED TO PHILANTHROPY





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Jackson Square considers ESG factors as part of its investment process and follows a principal-based ESG framework that is subject to change. Jackson Square does not seek to implement a specific ESG, impact or sustainability strategy

The examples are provided to illustrate the integration of ESG in our investment process.

Please refer to our [ESG Policy](#) for a complete list of ESG factors and key principals considered as part of the evaluation process.