



ESG & CORPORATE RESPONSIBILITY

Jackson Square’s principles-based approach to ESG investing relies on analyzing positive and negative externalities and consultative engagement.

LEARN MORE

[ESG & Stewardship Policy](#) 

[ESG Engagement Report](#) 

[Proxy Voting Report](#) 

ENGAGEMENT

18 ESG-SPECIFIC ENGAGEMENTS ACROSS **16** COMPANIES IN 2023

106 ENGAGEMENTS TO DATE

PRI UPDATE

Jackson Square received its 2023 PRI Assessment Report and we are pleased to have made progress in several areas and outperformed the PRI median scores on both the Direct - Listed equity - Active fundamental and Confidence Building Measures sections.

[Read the full report](#)

EMPLOYEE STATISTICS

- 43% WOMEN
- 33% MINORITY
- 52% ALL UNDERREPRESENTED GROUPS
- 48% EMPLOYEE PARTNERS

PHILANTHROPY

\$1M+ DONATED TO DATE

100+ NON-PROFITS SUPPORTED

100% EMPLOYEE DIRECTED

2023 Donations were focused on disaster relief, education, and humanitarian efforts

Team Volunteer Highlights – Looking after our community and environment

SF Food Bank – supporting food security with pop-up pantries across San Francisco

Garden for the Environment – sustainable community gardening

SF Animal Care & Control – pet pantry stocking and care support

Family House – temporary housing for families of children with life-threatening illnesses

Hamilton Families – helping families in need celebrate the holidays

SPONSORSHIPS

Jackson Square supports discourse on interesting and relevant research and analysis across a wide range of subjects.

The Commonwealth Club

Where differing perspectives converge to discuss issues of public and civic concern

The Long Now Foundation

Fostering long-term thinking and responsibility in the framework of the next 10,000 years



DISCLOSURE

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Jackson Square considers ESG factors as part of its investment process and follows a principles-based ESG framework that is subject to change. Jackson Square does not seek to implement a specific ESG, impact or sustainability strategy. The ESG engagement statistics have been calculated based on an internal survey of the firm's ESG activities. Certain company level engagements have multiple ESG components and may therefore result in a single issuer engagement counting statistically towards E, S and/or G.

The examples are provided to illustrate the integration of ESG in our investment process. Additional information on the selection criteria and a full list of holdings is available upon request.

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