Boston Trust Walden Funds

Mutual Fund Names Changes (September 2020) – Frequently Asked Questions

Why did the names change? Boston Trust Walden Inc. and its parent company Boston Trust Walden Co[illegible]

Was this a corporate merger? Were Boston Trust and Walden two separate companies? No, this was not a merger. In 2019, we unified our two brand names into one: Boston Trust Walden. For over twenty years, Walden Asset Management was the brand name used to identify the firm’s impact investing practice. Walden was never a separate company. Boston Trust (in several legal forms) was the former corporate name of the firm.

Why now? The evolution of our brand identity has been intentionally gradual. We waited to change the names of the mutual funds until the investment adviser and fund family’s name change were established among shareholders and other interested parties.

Will there be any change to the way the funds are managed? No. The “Boston Trust Walden” branded funds will maintain the same investment goals, principal investment strategies, risks, environmental, social, and governance (“ESG”) screens, and impact strategies.

Do you plan to change the names of additional funds in the Boston Trust Walden Fund family? No, we do not plan to change the names of additional funds at this time. The Boston Trust Asset Management Fund (BTBFX), Boston Trust Equity Fund (BTEFX), Boston Trust Midcap Fund (BTMFX), and Boston Trust SMID Cap Fund (BTSMX) will not change.

The mutual fund formerly known as the Walden Small Cap Fund (WASOX) merged into the Boston Trust Walden Small Cap Fund (BOSOX) on April 3, 2020, subsequent to the adoption of ESG screens by BOSOX. The Prospectus Supplement is linked here. The FAQ for the merger is linked here.

The above is not an offer to buy or sell and investors should read and consider carefully the prospectus before making investing decisions. Investments in the funds are not obligations of Boston Trust Walden Company, are subject to investment risk including the loss of principal, and are not FDIC insured.

Please read the statutory prospectus or summary prospectus carefully before investing. An investor should consider the Fund’s investment objectives, risks, and charges and expenses carefully before investing or sending money. This and other important information about the investment management company can be found in the Fund’s prospectus or summary prospectus. To obtain a statutory prospectus or summary prospectus, please call 1-800-282-8782.

Foreside Financial Services, LLC, distributor.