Boston Trust Walden
Inc

Principle .

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E E B EC E & A EG

The Fund seeks long-term capital growth and income through an actively managed portfolio of equity and fxed income securities.

The Fund's investment process focuses on asset allocation, segment composition, and security selection. The Adviser seeks to construct a diversifed portfolio of reasonably valued equity and fxed income securities of higher quality companies and issuers.

A A
Asset allocation can be the foremost determinant of total portfolio return in most market environments. Moreover, tactical shifts among asset classes can enhance returns and reduce risk over time. Using quantitative and qualitative inputs to forecast asset class returns over a range of US and global economic scenarios, the Adviser sets policy intended to produce a prudent risk-return portfolio.

C
Within both the equity and fxed income segments, the Adviser makes judgments about portfolio composition intended to both enhance return and manage risk. These judgments include considerations such as sector allocation and portfolio duration.

Equity–The Adviser seeks to identify and invest in stocks of higher quality companies at reasonable prices. Higher quality companies are those judged to have sustainable business models, fnancial stability, prudent capital management, and fnancial statements that indicate past economic success. The Fund's equity investments are diversifed across economic sectors.

Fixed Income–Fixed income holdings are generally those issued by either the US government and its agencies, or investment-grade securities of higher quality US corporations. The Adviser seeks to add value through duration management, yield curve strategies, sector rotation, and individual security selection.

Returns quoted are past performance and do not guarantee future results; current performance may be lower or higher. Investment returns and principal value will vary; there may be a gain or loss when shares are sold. For performance of the fund compared to a broad-based index visit https://www.bostontrustwalden.com/investment-services/mutual-funds/ and review the most recently updated prospectus, annual/semi-annual report, or call 1-800-282-8782 ext. 7050.

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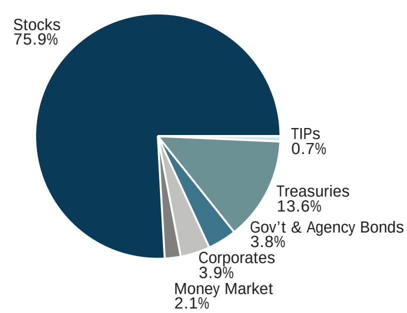

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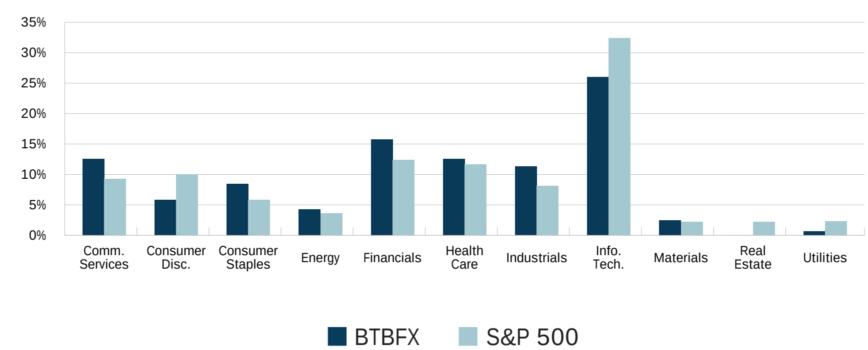
E EC A CA



For important disclosures and information regarding index definitions, please see reverse side.

F D

Equity securities (stocks) are generally more volatile and carry more risk than fxed income securities (bonds) and money market investments. The net asset value per share of this Fund will fuctuate as the value of the securities in the portfolio changes. Common stocks, and funds investing in common stocks, generally provide greater returns over long time periods than fxed income securities. Compared to stocks, bonds generally offer a relatively stable level of income. However, like stocks, bonds will fuctuate, thereby incurring the likelihood of principal gain or loss. The Fund is comprised primarily of equity and fxed income securities and is subject to market risk. Stocks may decline due to general market and economic conditions or due to company specifc circumstances. The Adviser's integration of ESG (Environmental, Social, and Governance) risks and opportunities and/or active ownership activities may cause the Fund to perform differently from a fund that uses a different methodology. ESG integration may cause the Fund to forego investment opportunities that may otherwise be advantageous.

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The S&P 500 is representative of the investible universe of US large capitalization companies. The Bloomberg Capital US Government/Credit Bond Index measures the performance of US Dollar denominated US Treasuries, government-related and investment grade US corporate securities that have a remaining maturity of greater than one year. The Bloomberg US Treasury Bellwether Indices are a series of benchmarks tracking the performance and attributes of eight on-therun US Treasuries that refect the most recently issued 3m, 6m, 2y, 3y, 5y, 10y and 30y securities.

ADD A D C E

Weights are subject to change. Weights are displayed as a percentage of the total fund. Please visit www.bostontrustwalden.com for a complete fund portfolio holdings list.

Please read