

3
Months

Company	Ticker	Weight
Microsoft	MSFT	8.7%
5'd\UMYh	GOOG/L	7.1%
Apple	AAPL	4.7%
Visa	V	2.7%
JPMorgan Chase	JPM	2.5%
ConocoPhillips	COP	2.4%
Accenture		

Security Selection

The Adviser seeks to identify and invest in stocks of higher quality companies that have a history of strong performance and that indicate past economic success. The Fund's equity investments are primarily in high quality US corporations. The Adviser seeks to add value through duration management, yield curve strategies, sector rotation, and individual security selection.

In addition, the Adviser utilizes active ownership strategies (e.g., effective climate risk management) and greater ESG transparency (e.g., increased disclosure of salient ESG risks and opportunities). Active ownership strategies include communicating directly with company management teams or filing shareholder resolutions.

Environmental, Social, and Governance Guidelines

The Fund's investment process considers a range of impacts they may have on the overall risk of the investment. In addition, the Adviser utilizes active ownership strategies (e.g., effective climate risk management) and greater ESG transparency (e.g., increased disclosure of salient ESG risks and opportunities). Active ownership strategies include communicating directly with company management teams or filing shareholder resolutions.

Boston Trust Walden Balanced Fund

EQUITY PORTFOLIO CHARACTERISTICS

of	WSBFX	S&P 50
	21.6%	18.5%
	32.4%	29.9%
	0.	0.
	0.2	0.
	\$1,022	\$1,011
	1.2	2.3
Sales per Share Growth (5 yrs)	12.5%	13.6%
Earnings per Share Growth (5 yrs)	17.7%	17.8%
	26x	
	24x	
	3.5%	3.4%

Boston Trust Walden Inc. (the "Adviser") is the investment adviser Company ("Boston Trust Walden"), a Massachusetts chartered

FUND RISKS

9ei]imgYVf]hYg f]hc Wgk UFY [YbYfU ma cfY j c Uh Y UbX Wffma cfY f]g_ hUb U YX]bVta Y gYVf]hYg f]VcbXgk UbX a cbYma Uf_Yh]bj Ygha Ybng H Y bYh UggYhj Ui Y dYf g\UFY cZ h]g: i bX k] U Vh Uh Ug H Y j Ui Y cZ H Y gYVf]hYg]b H Y dcfhc]c VWUb [Yg 7ca a cb g]hc WgZ UbX Z bXg]bj Ygh]b Vta a cb g]hc WgZ [YbYfU mdfcj]XY [fYUh f fYh fbg: cj Yf cb [h]a Y dYf]cXg hUb U YX]bVta Y gYVf]hYg 7ca dUFYX hc g]hc WgZ VcbXg [YbYfU mcZ Yf U fY Uhj Y m ghU V Y Y j cZ]bVta Y <ck Y j Yfz]_Y g]hc WgZ VcbXg k] U Vh Uh z H Y fYVm]bW ff]b [H Y]_Y]ccX cZ df]bW dU [U]b cf cgg H Y : i bX]g Vta df]gYX df]a Uf]mcZYei]mUbX U YX]bVta Y gYVf]hYg UbX]g gi V Y V h c a Uf_Yh f]g_ G]hc WgZ a UmXYV]b Y Xi Y hc [YbYfU a Uf_YhUbX YVtbca]WVtbX]hcbg cf Xi Y hc Vta dUbmgdYUWVWV a g]hUbVg H Y 5Xj]gYf]g]bh [fU]cb cZ 9G; f]g_g UbX cddcfh b]h Yg UbX #cf U M]j Y ck bYfg \d U M]j]h Yg a Um]Wl gY H Y : i bX hc perform differently from a fund that uses a different methodology. ESG integration may cause the Fund to forego investment opportunities that may ch.Yfk]gY VY UXj UbrU [Yci g H Y : i bX]g 9G; gVY Yb]b [V]h Y f]U a Um]b U YbW H Y : i bX]g Yl dcci fY hc Wf]U]b Vta dUb]YgZ gYVtcfgZ UbX #cf]bXi g]f]YgZ which may adversely affect the Fund's performance depending on how such companies, sectors, and/or industries are performing relative to the market.