

Introducing **reo**[®]

Our Responsible Engagement
Overlay service



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Discover how our Responsible Engagement Overlay service (**reo**[®]) can help you to advance your responsible investment strategy, wherever you are on your journey.



Help drive positive change

Successful engagements often take a long time and require an ongoing, dedicated resource. This can be difficult for individual organisations to maintain. Choose **reo**[®] to delegate your active ownership to us – we'll engage companies and vote on your behalf to help manage Environmental, Social and Governance (ESG) risks and seek sustainable opportunities.



Gain access to subject matter experts

Enjoy the expertise of our dedicated engagement and voting analysts, who are specialists on a diverse range of ESG issues, sectors and geographies, and are involved in multiple industry collaboration projects and public policy work.



Become a responsible market participant

Use our reporting to manage stakeholders and meet regulatory requirements.

\$1.1trn

reo[®] client assets under engagement, pooled into one powerful voice with significant weight behind it to promote positive change*

22

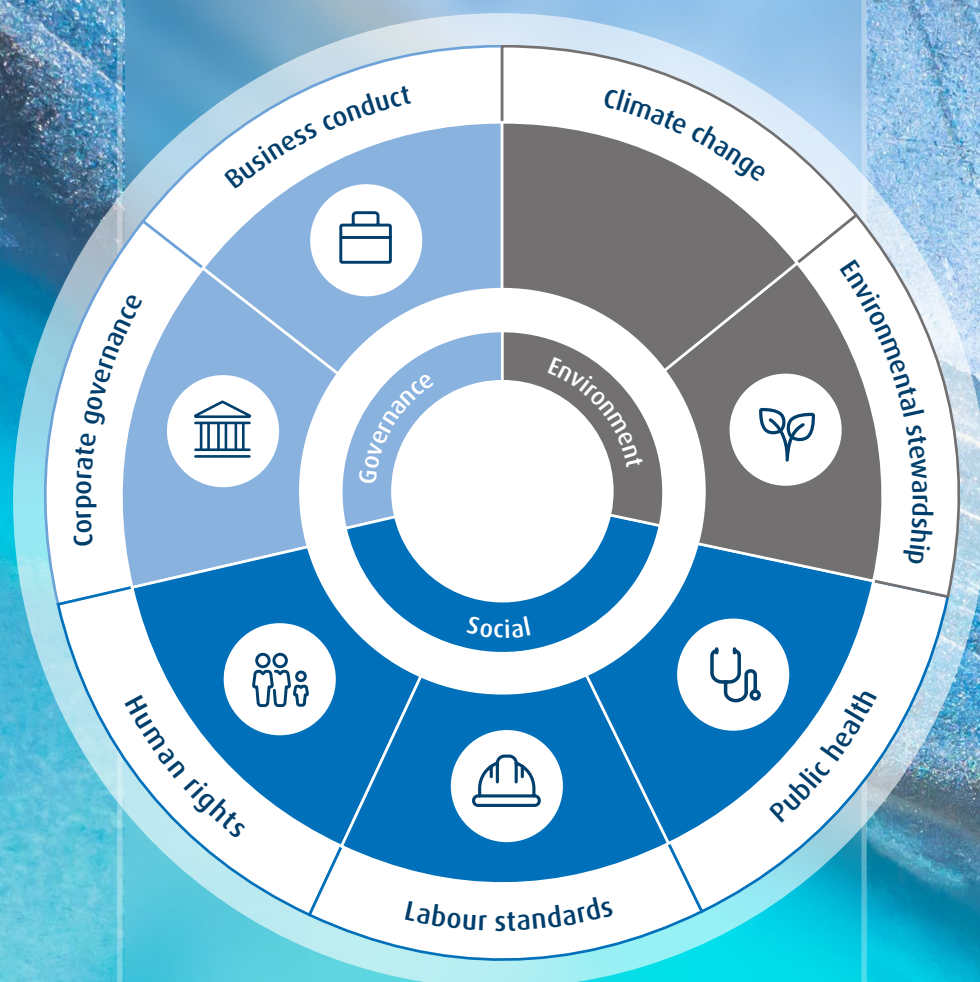
year track record** of engagement, and a clear sense from experience of what good engagement looks like

45+

members in our Responsible Investment team, with the skills to support your active ownership strategy.

*Refers to externally managed client assets. Source: Columbia Threadneedle Investments, as at 30 June 2022.

**Reflects the experience of a group of legal entities whose parent company is Columbia Threadneedle Investments UK International Limited and that formerly traded as BMO Global Asset Management EMEA. These entities are now part of Columbia Threadneedle Investments which is the asset management business of Ameriprise Financial, Inc.



Be a part of our holistic engagement programme

Our global engagement programme is structured around seven high-level themes encompassing environmental, social and governance issues of most relevance to investors, and more granular subthemes within each. We also cover the following sectors, which each face a unique set of ESG-related risks and opportunities:

- Consumer discretionary
- Consumer staples
- Energy
- Financials
- Healthcare
- Industrials
- Information technology
- Materials
- Telecommunication services
- Utilities

We engage companies in both developed and emerging markets across the globe. Our Responsible Investment team includes a range of nationalities with different language skills that strengthens the effectiveness of our company engagement by enhancing our understanding of the context and environment in which the companies operate and the challenges they face.

Chosen in consultation with you

We incorporate your views into our engagement programme through our Client Consultation. Unique to **reo**®, each year we give you the opportunity to voice your ESG thematic engagement priorities – and use the results to determine our thematic engagement and related project work for the year.

All aligned with the Sustainable Development Goals (SDGs)





We align our engagement to the 17 SDGs and the 169 underlying targets – a globally recognised and ambitious set of targets that provide a consistent way to articulate sustainability.






Engagement project examples

Below are examples of recent engagement projects that were chosen with *reo*® clients' preferences in mind.



Coal phase-out

	Lead analyst: Vicki Bakhshi Director, Responsible Investment analyst	Industry: Materials, Utilities	Theme: Climate Change	Links to SDG goals:
				  

Social audit assurance

	Lead analyst: Tenisha Elliott Associate, Responsible Investment analyst	Industry: Social Audit Assurers & Cross Sector	Theme: Human rights	Links to SDG goals:
				 

Protecting biodiversity

	Marcus Wilert Vice President, Responsible Investment analyst	Industry: Cross-sector	Theme: Environmental Stewardship	Links to SDG goals:
				   

Recording engagement progress

When a company improves its ESG practices following our engagement, we record this as a milestone and include it in our reporting. We align these to the SDGs and organise them from a one to three star rating, depending on our view of the significance of the positive change made.

Engagement reinforced by proxy voting

A key tool within our engagement escalation strategy, voting against management on key resolutions sends a clear signal to companies about our expectations. Our specialist Corporate

Governance team works with ISS to deliver a comprehensive voting programme, structured on a regional rather than sectoral basis to reflect local nuances in company law and best practice codes.

You can expect:



Coverage of 25 market/region-specific voting rules



An experienced team who play active roles in global industry groups with expertise on governance and related public policy issues



Tailored policy options



The opportunity to vote differentially



Detailed voting and engagement reports with vote comments



Notice of our vote position for high-profile issues



Reporting and resources

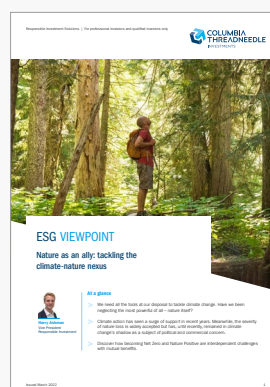
Conducting active ownership activity is one thing; reporting progress is another. We understand the importance of comprehensive and transparent reporting, and offer access to a quality suite of content and our online **reo**® Partner Portal.

This includes, but is not limited to:

- Client-tailored quarterly reporting for engagement and voting
- Our annual review and outlook of the overall **reo**® programme
- UN PRI reporting assistance
- Corporate governance guidelines
- Thought leadership content
- Company site visits and engagement participation

Log into the Partner Portal to access your reports and content, and explore:

- Company engagement
- Engagement projects
- Engagement case studies
- Records of milestones



Left: example of thought leadership content.



Right: example of an annual engagement priorities outlook.

Contact us

✉ clientsupport@columbiathreadneedle.com
💻 columbiathreadneedle.com

To find out more visit columbiathreadneedle.com



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