

## VOTE SUMMARY REPORT

REPORTING PERIOD: 10/01/2023 to 12/31/2023

### Apollo Global Management, Inc.

**Meeting Date:** 10/06/2023      **Country:** USA      **Ticker:** APO  
**Record Date:** 08/11/2023      **Meeting Type:** Annual  
**Primary Security ID:** 03769M106

**Earliest Cutoff Date:** 10/05/2023

**Shares Voted:** 21,853

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Marc Beilinson	Mgmt	Yes	For	For	For
1.2	Elect Director James Belardi	Mgmt	Yes	For	For	For
1.3	Elect Director Jessica Bibliowicz	Mgmt	Yes	For	For	For
1.4	Elect Director Walter (Jay) Clayton	Mgmt	Yes	For	For	For
1.5	Elect Director Michael Ducey	Mgmt	Yes	For	For	For
1.6	Elect Director Kerry Murphy Healey	Mgmt	Yes	For	For	For
1.7	Elect Director Mitra Hormozi	Mgmt	Yes	For	For	For
1.8	Elect Director Pamela Joyner	Mgmt	Yes	For	For	For
1.9	Elect Director Scott Kleinman	Mgmt	Yes	For	For	For
1.10	Elect Director A.B. Krongard	Mgmt	Yes	For	For	For
1.11	Elect Director Pauline Richards	Mgmt	Yes	For	For	For
1.12	Elect Director Marc Rowan	Mgmt	Yes	For	For	For
1.13	Elect Director David Simon	Mgmt	Yes	For	For	For
1.14	Elect Director Lynn Swann	Mgmt	Yes	For	For	For
1.15	Elect Director Patrick Toomey	Mgmt	Yes	For	For	For
1.16	Elect Director James Zelter	Mgmt	Yes	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For

### The Procter & Gamble Company

**Meeting Date:** 10/10/2023      **Country:** USA      **Ticker:** PG  
**Record Date:** 08/11/2023      **Meeting Type:** Annual  
**Primary Security ID:** 742718109

**Earliest Cutoff Date:** 10/09/2023

**Shares Voted:** 7,977

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director B. Marc Allen	Mgmt	Yes	For	For	For

# The Procter & Gamble Company

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Brett Biggs	Mgmt	Yes	For	For	For
1c	Elect Director Sheila Bonini	Mgmt	Yes	For	For	For
1d	Elect Director Angela F. Braly	Mgmt	Yes	For	For	For
1e	Elect Director Amy L. Chang	Mgmt	Yes	For	For	For
1f	Elect Director Joseph Jimenez	Mgmt	Yes	For	For	For
1g	Elect Director Christopher Kempczinski	Mgmt	Yes	For	For	For
1h	Elect Director Debra L. Lee	Mgmt	Yes	For	For	For
1i	Elect Director Terry J. Lundgren	Mgmt	Yes	For	For	For
1j	Elect Director Christine M. McCarthy	Mgmt	Yes	For	For	For
1k	Elect Director Jon R. Moeller	Mgmt	Yes	For	For	For
1l	Elect Director Robert J. Portman	Mgmt	Yes	For	For	For
1m	Elect Director Rajesh Subramaniam	Mgmt	Yes	For	For	For
1n	Elect Director Patricia A. Woertz	Mgmt	Yes	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	Yes	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For
4	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year
5	Report on Third-Party Civil Rights Audit of Reverse Discrimination	SH	Yes	Against	Against	Against
6	Report on Risks Related to Operations in China	SH	Yes	Against	Against	Against
7	Amend Bylaws to Require Shareholder Approval of Certain Provisions Related to Director Nominations by Shareholders	SH	Yes	Against	Against	Against

# Newmont Corporation

**Meeting Date:** 10/11/2023

**Country:** USA

**Ticker:** NEM

**Record Date:** 09/01/2023

**Meeting Type:** Special

**Primary Security ID:** 651639106

**Earliest Cutoff Date:** 10/10/2023

**Shares Voted:** 11,000

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Issue Shares in Connection with Transaction	Mgmt	Yes	For	For	For
2	Increase Authorized Common Stock	Mgmt	Yes	For	For	For
3	Adjourn Meeting	Mgmt	Yes	For	For	For

# Microsoft Corporation

Meeting Date: 12/07/2023

Country: USA

Ticker: MSFT

Record Date: 09/29/2023

Meeting Type: Annual

Primary Security ID: 594918104

Earliest Cutoff Date: 12/06/2023

Shares Voted: 8,595

Proposal Number	Proposal Text	Proponent	Votable Proposal	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.01	Elect Director Reid G. Hoffman	Mgmt	Yes	For	For	For
1.02	Elect Director Hugh F. Johnston	Mgmt	Yes	For	For	For
1.03	Elect Director Teri L. List	Mgmt	Yes	For	For	For
1.04	Elect Director Catherine MacGregor	Mgmt	Yes	For	For	For
1.05	Elect Director Mark A. L. Mason	Mgmt	Yes	For	For	For
1.06	Elect Director Satya Nadella	Mgmt	Yes	For	For	For
1.07	Elect Director Sandra E. Peterson	Mgmt	Yes	For	For	For
1.08	Elect Director Penny S. Pritzker	Mgmt	Yes	For	For	For
1.09	Elect Director Carlos A. Rodriguez	Mgmt	Yes	For	For	For
1.10	Elect Director Charles W. Scharf	Mgmt	Yes	For	For	For
1.11	Elect Director John W. Stanton	Mgmt	Yes	For	For	For
1.12	Elect Director Emma N. Walmsley	Mgmt	Yes	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	Yes	For	For	For
3	Advisory Vote on Say on Pay Frequency	Mgmt	Yes	One Year	One Year	One Year
4	Ratify Deloitte and & Touche as Auditors	Mgmt	Yes	For	For	For
5	Report on Gender-Based Compensation and Benefits Inequities	SH	Yes	Against	Against	Against
6	Report on Risks of Omitting Viewpoint and Ideological Diversity from EEO Policy	SH	Yes	Against	Against	Against
7	Report on Government Take Down Requests	SH	Yes	Against	Against	Against
8	Report on Risks of Weapons Development	SH	Yes	Against	Against	Against
9	Report on Climate Risk in Retirement Plan Options	SH	Yes	Against	Against	Against
10	Publish a Tax Transparency Report	SH	Yes	Against	Against	Against
11	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Yes	Against	Against	Against
12	Adopt a Policy Requiring Third Party Groups to Report Their Political Expenditures	SH	Yes	Against	Against	Against
13	Report on Risks Related to AI Generated Misinformation and Disinformation	SH	Yes	Against	Against	Against

## VOTE SUMMARY REPORT

REPORTING PERIOD: 01/01/2024 to 03/31/2024

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): SUN LIFE DYNAMIC  
STRATEGIC YIELD

### Costco Wholesale Corporation

**Meeting Date:** 01/18/2024      **Country:** USA      **Ticker:** COST  
**Record Date:** 11/10/2023      **Meeting Type:** Annual  
**Primary Security ID:** 22160K105

Shares Voted: 1,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Susan L. Decker	Mgmt	For	For	For
1b	Elect Director Kenneth D. Denman	Mgmt	For	For	For
1c	Elect Director Helena B. Foulkes	Mgmt	For	For	For
1d	Elect Director Richard A. Galanti	Mgmt	For	For	For
1e	Elect Director Hamilton E. James	Mgmt	For	For	For
1f	Elect Director W. Craig Jelinek	Mgmt	For	For	For
1g	Elect Director Sally Jewell	Mgmt	For	For	For
1h	Elect Director Jeffrey S. Raikes	Mgmt	For	For	For
1i	Elect Director John W. Stanton	Mgmt	For	For	For
1j	Elect Director Ron M. Vachris	Mgmt	For	For	For
1k	Elect Director Mary Agnes (Maggie) Wilderotter	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Issue Audited Report on Fiduciary Relevance of Decarbonization Goal	SH	Against	Against	Against

### Visa Inc.

**Meeting Date:** 01/23/2024      **Country:** USA      **Ticker:** V  
**Record Date:** 11/24/2023      **Meeting Type:** Annual  
**Primary Security ID:** 92826C839

Shares Voted: 2,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For	For
1c	Elect Director Francisco Javier Fernandez-Carbajal	Mgmt	For	For	For
1d	Elect Director Ramon Laguarta	Mgmt	For	For	For

## Visa Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Teri L. List	Mgmt	For	For	For
1f	Elect Director John F. Lundgren	Mgmt	For	For	For
1g	Elect Director Ryan McInerney	Mgmt	For	For	For
1h	Elect Director Denise M. Morrison	Mgmt	For	For	For
1i	Elect Director Pamela Murphy	Mgmt	For	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For	For
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Approve Class B Exchange Offer Program Certificate Amendments	Mgmt	For	For	For
5	Adjourn Meeting	Mgmt	For	For	For
6	Submit Severance Agreement (Change-in-Control) to Shareholder Vote	SH	Against	Against	Against

## Apple Inc.

**Meeting Date:** 02/28/2024      **Country:** USA      **Ticker:** AAPL  
**Record Date:** 01/02/2024      **Meeting Type:** Annual  
**Primary Security ID:** 037833100

Shares Voted: 7,872

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Wanda Austin	Mgmt	For	For	For
1b	Elect Director Tim Cook	Mgmt	For	For	For
1c	Elect Director Alex Gorsky	Mgmt	For	For	For
1d	Elect Director Andrea Jung	Mgmt	For	For	For
1e	Elect Director Art Levinson	Mgmt	For	For	For
1f	Elect Director Monica Lozano	Mgmt	For	For	For
1g	Elect Director Ron Sugar	Mgmt	For	For	For
1h	Elect Director Sue Wagner	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Risks of Omitting Viewpoint and Ideological Diversity from EEO Policy	SH	Against	Against	Against

<b>Proposal Number</b>	<b>Proposal Text</b>	<b>Proponent</b>	<b>Mgmt Rec</b>	<b>Voting Policy Rec</b>	<b>Vote Instruction</b>
5	Report on Standards and Procedures to Curate App Content	SH	Against	Against	Against
6	Report on Median Gender/Racial Pay Gap	SH	Against	Against	Against
7	Report on Use of Artificial Intelligence	SH	Against	Against	Against
8	Report on Congruency of Company's Privacy and Human Rights Policies with its Actions	SH	Against	Against	Against

## VOTE SUMMARY REPORT

REPORTING PERIOD: 04/01/2024 to 06/30/2024

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): SUN LIFE DYNAMIC  
STRATEGIC YIELD

### The Bank of Nova Scotia

**Meeting Date:** 04/09/2024      **Country:** Canada      **Ticker:** BNS  
**Record Date:** 02/13/2024      **Meeting Type:** Annual  
**Primary Security ID:** 064149107

Shares Voted: 34,536

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nora A. Aufreiter	Mgmt	For	For	For
1.2	Elect Director Guillermo E. Babatz	Mgmt	For	For	For
1.3	Elect Director Scott B. Bonham	Mgmt	For	For	For
1.4	Elect Director Daniel (Don) H. Callahan	Mgmt	For	For	For
1.5	Elect Director W. Dave Dowrich	Mgmt	For	For	For
1.6	Elect Director Michael B. Medline	Mgmt	For	For	For
1.7	Elect Director Lynn K. Patterson	Mgmt	For	For	For
1.8	Elect Director Michael D. Penner	Mgmt	For	For	For
1.9	Elect Director Una M. Power	Mgmt	For	For	For
1.10	Elect Director Aaron W. Regent	Mgmt	For	For	For
1.11	Elect Director Calin Rovinescu	Mgmt	For	For	For
1.12	Elect Director Sandra J. Stuart	Mgmt	For	For	For
1.13	Elect Director L. Scott Thomson	Mgmt	For	For	For
1.14	Elect Director Benita M. Warmbold	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
	Shareholder Proposal	Mgmt			
4	SP 1: Report on Impact of Oil and Gas Divestment	SH	Against	Against	Against
5	SP 2: Disclose Non-Confidential Information Relating to the Bank's Country-by-Country Reporting	SH	Against	Against	Against
6	SP 3: Advisory Vote on Environmental Policies	SH	Against	Against	Against

### Royal Bank of Canada

**Meeting Date:** 04/11/2024      **Country:** Canada      **Ticker:** RY  
**Record Date:** 02/13/2024      **Meeting Type:** Annual  
**Primary Security ID:** 780087102

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mirko Bibic	Mgmt	For	For	For
1.2	Elect Director Andrew A. Chisholm	Mgmt	For	For	For
1.3	Elect Director Jacynthe Cote	Mgmt	For	For	For
1.4	Elect Director Toos N. Daruvala	Mgmt	For	For	For
1.5	Elect Director Cynthia Devine	Mgmt	For	For	For
1.6	Elect Director Roberta L. Jamieson	Mgmt	For	For	For
1.7	Elect Director David McKay	Mgmt	For	For	For
1.8	Elect Director Amanda Norton	Mgmt	For	For	For
1.9	Elect Director Barry Perry	Mgmt	For	For	For
1.10	Elect Director Maryann Turcke	Mgmt	For	For	For
1.11	Elect Director Thierry Vandal	Mgmt	For	For	For
1.12	Elect Director Frank Vettese	Mgmt	For	For	For
1.13	Elect Director Jeffery Yabuki	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
	Shareholder Proposals	Mgmt			
1	SP 1: Disclose Clean Energy to Fossil Fuel Financing Ratios	SH	Against	Against	Against
2	SP 2: Report on Impact of Oil and Gas Divestment	SH	Against	Against	Against
3	SP 3: Disclose the CEO Compensation to Median Worker Pay Ratio on an Annual Basis	SH	Against	Against	Against
4	SP 4: Hold Annual Meetings of the Company in Person with Virtual Meetings as Complements	SH	Against	Against	Against
5	SP 5: Disclose Non-Confidential Information Relating to the Bank's Country-by-Country Reporting	SH	Against	Against	Against
6	SP 6: Report on Loans Made by the Bank in Support of the Circular Economy	SH	Against	Against	Against
7	SP 7: Advisory Vote on Environmental Policies	SH	Against	Against	Against

## Bank of Montreal

Meeting Date: 04/16/2024

Country: Canada

Ticker: BMO

Record Date: 02/16/2024

Meeting Type: Annual

Primary Security ID: 063671101

# Bank of Montreal

Shares Voted: 8,200

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Janice M. Babiak	Mgmt	For	For	For
1.2	Elect Director Craig W. Broderick	Mgmt	For	For	For
1.3	Elect Director Hazel Claxton	Mgmt	For	For	For
1.4	Elect Director George A. Cope	Mgmt	For	For	For
1.5	Elect Director Stephen Dent	Mgmt	For	For	For
1.6	Elect Director Christine A. Edwards	Mgmt	For	For	For
1.7	Elect Director Martin S. Eichenbaum	Mgmt	For	For	For
1.8	Elect Director David E. Harquail	Mgmt	For	For	For
1.9	Elect Director Linda S. Huber	Mgmt	For	For	For
1.10	Elect Director Eric R. La Fleche	Mgmt	For	For	For
1.11	Elect Director Lorraine Mitchelmore	Mgmt	For	For	For
1.12	Elect Director Madhu Ranganathan	Mgmt	For	For	For
1.13	Elect Director Darryl White	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
	Shareholder Proposals	Mgmt			
4	SP 1: Hold Annual Meetings of the Company in Person with Virtual Meetings as Complements	SH	Against	Against	Against
5	SP 2: Disclose Non-Confidential Information Relating to the Bank's Country-by-Country Reporting	SH	Against	Against	Against
6	SP 3: Advisory Vote on Environmental Policies	SH	Against	Against	Against
7	SP 4: Report on Impact of Oil and Gas Divestment	SH	Against	Against	Against
8	SP 5: Disclose the CEO Compensation to Median Worker Pay Ratio on an Annual Basis	SH	Against	Against	Against

# The Toronto-Dominion Bank

Meeting Date: 04/18/2024

Country: Canada

Ticker: TD

Record Date: 02/20/2024

Meeting Type: Annual/Special

Primary Security ID: 891160509

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Ayman Antoun	Mgmt	For	For	For
1.2	Elect Director Cherie L. Brant	Mgmt	For	For	For
1.3	Elect Director Amy W. Brinkley	Mgmt	For	For	For
1.4	Elect Director Brian C. Ferguson	Mgmt	For	For	For
1.5	Elect Director Colleen A. Goggins	Mgmt	For	For	For
1.6	Elect Director Alan N. MacGibbon	Mgmt	For	For	For
1.7	Elect Director John B. MacIntyre	Mgmt	For	For	For
1.8	Elect Director Karen E. Maidment	Mgmt	For	For	For
1.9	Elect Director Keith G. Martell	Mgmt	For	For	For
1.10	Elect Director Bharat B. Masrani	Mgmt	For	For	For
1.11	Elect Director Claude Mongeau	Mgmt	For	For	For
1.12	Elect Director S. Jane Rowe	Mgmt	For	For	For
1.13	Elect Director Nancy G. Tower	Mgmt	For	For	For
1.14	Elect Director Ajay K. Virmani	Mgmt	For	For	For
1.15	Elect Director Mary A. Winston	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
4	Approve Increase in Maximum Aggregate Remuneration of Directors	Mgmt	For	For	For
5	Approve Other By-law No. 1 Amendments	Mgmt	For	For	For
	Shareholder Proposals	Mgmt			
6	SP 1: Disclose the CEO Compensation to Median Worker Pay Ratio on an Annual Basis	SH	Against	Against	Against
7	SP 2: Disclose Transition Activities Towards 2030 Emission Reduction Targets	SH	Against	Against	Against
8	SP 3: Introduce Incentive Compensation for All Employees Against ESG Objectives	SH	Against	Against	Against
9	SP 4: Disclose Non-Confidential Information Relating to the Bank's Country-by-Country Reporting	SH	Against	Against	Against
10	SP 5: Advisory Vote on Environmental Policies	SH	Against	Against	Against
11	SP 6: Report on Impact of Oil and Gas Divestment	SH	Against	Against	Against
12	SP 7: Report on All Out-of-Court Settlements	SH	Against	Against	Against

## The Toronto-Dominion Bank

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
13	SP 8: Establish an All Out-of-Court Settlements Committee	SH	Against	Against	Against
14	SP 9: Provide All Employees the Same Amount of Benefit Credits	SH	Against	Against	Against

## Canadian Pacific Kansas City Limited

**Meeting Date:** 04/24/2024      **Country:** Canada      **Ticker:** CP  
**Record Date:** 03/12/2024      **Meeting Type:** Annual  
**Primary Security ID:** 13646K108

**Shares Voted:** 21,954

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
2	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
3	Management Advisory Vote on Climate Change	Mgmt	For	For	For
4.1	Elect Director John Baird	Mgmt	For	For	For
4.2	Elect Director Isabelle Courville	Mgmt	For	For	For
4.3	Elect Director Keith E. Creel	Mgmt	For	For	For
4.4	Elect Director Antonio Garza	Mgmt	For	For	For
4.5	Elect Director Edward R. Hamberger	Mgmt	For	For	For
4.6	Elect Director Janet H. Kennedy	Mgmt	For	For	For
4.7	Elect Director Henry J. Maier	Mgmt	For	For	For
4.8	Elect Director Matthew H. Paull	Mgmt	For	For	For
4.9	Elect Director Jane L. Peverett	Mgmt	For	For	For
4.10	Elect Director Andrea Robertson	Mgmt	For	For	For
4.11	Elect Director Gordon T. Trafton	Mgmt	For	For	For
	Shareholder Proposal	Mgmt			
5	SP 1: Adopt a Paid Sick Leave Policy	SH	Against	Against	Against

## Johnson & Johnson

**Meeting Date:** 04/25/2024      **Country:** USA      **Ticker:** JNJ  
**Record Date:** 02/27/2024      **Meeting Type:** Annual  
**Primary Security ID:** 478160104

# Johnson & Johnson

Shares Voted: 5,020

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For	For
1b	Elect Director Mary C. Beckerle	Mgmt	For	For	For
1c	Elect Director D. Scott Davis	Mgmt	For	For	For
1d	Elect Director Jennifer A. Doudna	Mgmt	For	For	For
1e	Elect Director Joaquin Duato	Mgmt	For	For	For
1f	Elect Director Marilyn A. Hewson	Mgmt	For	For	For
1g	Elect Director Paula A. Johnson	Mgmt	For	For	For
1h	Elect Director Hubert Joly	Mgmt	For	For	For
1i	Elect Director Mark B. McClellan	Mgmt	For	For	For
1j	Elect Director Anne M. Mulcahy	Mgmt	For	For	For
1k	Elect Director Mark A. Weinberger	Mgmt	For	For	For
1l	Elect Director Nadja Y. West	Mgmt	For	For	For
1m	Elect Director Eugene A. Woods	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Report on Gender-Based Compensation and Benefits Inequities	SH	Against	Against	Against
5	Report on Impact of Extended Patent Exclusivities on Product Access	SH			

# The Williams Companies, Inc.

Meeting Date: 04/30/2024

Country: USA

Ticker: WMB

Record Date: 03/07/2024

Meeting Type: Annual

Primary Security ID: 969457100

Shares Voted: 31,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Alan S. Armstrong	Mgmt	For	For	For
1.2	Elect Director Stephen W. Bergstrom	Mgmt	For	For	For
1.3	Elect Director Michael A. Creel	Mgmt	For	For	For
1.4	Elect Director Stacey H. Dore	Mgmt	For	For	For
1.5	Elect Director Carri A. Lockhart	Mgmt	For	For	For
1.6	Elect Director Richard E. Muncrief	Mgmt	For	For	For

## The Williams Companies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.7	Elect Director Peter A. Ragauss	Mgmt	For	For	For
1.8	Elect Director Rose M. Robeson	Mgmt	For	For	For
1.9	Elect Director Scott D. Sheffield	Mgmt	For	For	For
1.10	Elect Director Murray D. Smith	Mgmt	For	For	For
1.11	Elect Director William H. Spence	Mgmt	For	For	For
1.12	Elect Director Jesse J. Tyson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For	For
5	Publish Report Assessing Policy Options Related to Venting and Flaring - Withdrawn Resolution	SH			

## Canadian Natural Resources Limited

**Meeting Date:** 05/02/2024

**Country:** Canada

**Ticker:** CNQ

**Record Date:** 03/13/2024

**Meeting Type:** Annual/Special

**Primary Security ID:** 136385101

**Shares Voted:** 24,200

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Catherine M. Best	Mgmt	For	For	For
1.2	Elect Director M. Elizabeth Cannon	Mgmt	For	For	For
1.3	Elect Director N. Murray Edwards	Mgmt	For	For	For
1.4	Elect Director Christopher L. Fong	Mgmt	For	For	For
1.5	Elect Director Gordon D. Giffin	Mgmt	For	For	For
1.6	Elect Director Wilfred A. Gobert	Mgmt	For	For	For
1.7	Elect Director Christine M. Healy	Mgmt	For	For	For
1.8	Elect Director Steve W. Laut	Mgmt	For	For	For
1.9	Elect Director Frank J. McKenna	Mgmt	For	For	For
1.10	Elect Director Scott G. Stauth	Mgmt	For	For	For
1.11	Elect Director David A. Tuer	Mgmt	For	For	For
1.12	Elect Director Annette M. Verschuren	Mgmt	For	For	For
2	Approve PricewaterhouseCoopers LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Approve Share Split	Mgmt	For	For	For

## Canadian Natural Resources Limited

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
4	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Fortis Inc.

**Meeting Date:** 05/02/2024      **Country:** Canada      **Ticker:** FTS  
**Record Date:** 03/15/2024      **Meeting Type:** Annual/Special  
**Primary Security ID:** 349553107

**Shares Voted:** 26,624

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Tracey C. Ball	Mgmt	For	For	For
1.2	Elect Director Pierre J. Blouin	Mgmt	For	For	For
1.3	Elect Director Lawrence T. Borgard	Mgmt	For	For	For
1.4	Elect Director Maura J. Clark	Mgmt	For	For	For
1.5	Elect Director Lisa Crutchfield	Mgmt	For	For	For
1.6	Elect Director Margarita K. Dilley	Mgmt	For	For	For
1.7	Elect Director Julie A. Dobson	Mgmt	For	For	For
1.8	Elect Director Lisa L. Durocher	Mgmt	For	For	For
1.9	Elect Director David G. Hutchens	Mgmt	For	For	For
1.10	Elect Director Gianna M. Manes	Mgmt	For	For	For
1.11	Elect Director Donald R. Marchand	Mgmt	For	For	For
1.12	Elect Director Jo Mark Zurel	Mgmt	For	For	For
2	Approve Deloitte LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
4	Approve Omnibus Equity Plan	Mgmt	For	For	For

## Andlauer Healthcare Group Inc.

**Meeting Date:** 05/03/2024      **Country:** Canada      **Ticker:** AND  
**Record Date:** 03/06/2024      **Meeting Type:** Annual  
**Primary Security ID:** 034223107

**Shares Voted:** 35,957

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1A	Elect Director Rona Ambrose	Mgmt	For	For	For

## Andlauer Healthcare Group Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1B	Elect Director Michael Andlauer	Mgmt	For	For	For
1C	Elect Director Peter Jelley	Mgmt	For	For	For
1D	Elect Director Cameron Joyce	Mgmt	For	For	For
1E	Elect Director Joseph Schlett	Mgmt	For	For	For
1F	Elect Director Evelyn Sutherland	Mgmt	For	For	For
1G	Elect Director Thomas Wellner	Mgmt	For	For	For
2	Approve KPMG LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For

## Enbridge Inc.

**Meeting Date:** 05/08/2024

**Country:** Canada

**Ticker:** ENB

**Record Date:** 03/13/2024

**Meeting Type:** Annual

**Primary Security ID:** 29250N105

**Shares Voted:** 50,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Mayank (Mike) M. Ashar	Mgmt	For	For	For
1.2	Elect Director Gaurdie E. Banister	Mgmt	For	For	For
1.3	Elect Director Pamela L. Carter	Mgmt	For	For	For
1.4	Elect Director Susan M. Cunningham	Mgmt	For	For	For
1.5	Elect Director Gregory L. Ebel	Mgmt	For	For	For
1.6	Elect Director Jason B. Few	Mgmt	For	For	For
1.7	Elect Director Theresa B.Y. Jang	Mgmt	For	For	For
1.8	Elect Director Teresa S. Madden	Mgmt	For	For	For
1.9	Elect Director Manjit Minhas	Mgmt	For	For	For
1.10	Elect Director Stephen S. Poloz	Mgmt	For	For	For
1.11	Elect Director S. Jane Rowe	Mgmt	For	For	For
1.12	Elect Director Steven W. Williams	Mgmt	For	For	For
2	Approve PricewaterhouseCoopers LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
	Shareholder Proposals	Mgmt			
4	SP 1: Report on Governance Systems in Light of Climate and Environmental Misrepresentations	SH	Against	Against	Against

## Enbridge Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	SP 2: Disclose the Company's Scope 3 Emissions	SH	Against	Against	Against

## Intact Financial Corporation

**Meeting Date:** 05/08/2024      **Country:** Canada      **Ticker:** IFC  
**Record Date:** 03/15/2024      **Meeting Type:** Annual  
**Primary Security ID:** 45823T106

**Shares Voted:** 4,200

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Charles Brindamour	Mgmt	For	For	For
1.2	Elect Director Emmanuel Clarke	Mgmt	For	For	For
1.3	Elect Director Janet De Silva	Mgmt	For	For	For
1.4	Elect Director Michael Katchen	Mgmt	For	For	For
1.5	Elect Director Stephani Kingsmill	Mgmt	For	For	For
1.6	Elect Director Jane E. Kinney	Mgmt	For	For	For
1.7	Elect Director Robert G. Leary	Mgmt	For	For	For
1.8	Elect Director Sylvie Paquette	Mgmt	For	For	For
1.9	Elect Director Stuart J. Russell	Mgmt	For	For	For
1.10	Elect Director Indira V. Samarasekera	Mgmt	For	For	For
1.11	Elect Director Frederick Singer	Mgmt	For	For	For
1.12	Elect Director Carolyn A. Wilkins	Mgmt	For	For	For
1.13	Elect Director William L. Young	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Re-approve Stock Option Plan	Mgmt	For	For	For
4	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Killam Apartment REIT

**Meeting Date:** 05/08/2024      **Country:** Canada      **Ticker:** KMP.UN  
**Record Date:** 03/26/2024      **Meeting Type:** Annual  
**Primary Security ID:** 49410M102

**Shares Voted:** 106,596

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Trustee Philip D. Fraser	Mgmt	For	For	For

## Killam Apartment REIT

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.2	Elect Trustee Aldea M. Landry	Mgmt	For	For	For
1.3	Elect Trustee James C. Lawley	Mgmt	For	For	For
1.4	Elect Trustee Karine L. MacIndoe	Mgmt	For	For	For
1.5	Elect Trustee Laurie M. MacKeigan	Mgmt	For	For	For
1.6	Elect Trustee Doug McGregor	Mgmt	For	For	For
1.7	Elect Trustee Robert G. Richardson	Mgmt	For	For	For
1.8	Elect Trustee Manfred J. Walt	Mgmt	For	For	For
1.9	Elect Trustee Andree Savoie	Mgmt	For	For	For
1.10	Elect Trustee Shant Poladian	Mgmt	For	For	For
2	Approve Ernst & Young LLP as Auditors and Authorize Trustees to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Nutrien Ltd.

**Meeting Date:** 05/08/2024

**Country:** Canada

**Ticker:** NTR

**Record Date:** 03/20/2024

**Meeting Type:** Annual

**Primary Security ID:** 67077M108

**Shares Voted:** 18,600

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Christopher M. Burley	Mgmt	For	For	For
1.2	Elect Director Maura J. Clark	Mgmt	For	For	For
1.3	Elect Director Russell K. Girling	Mgmt	For	For	For
1.4	Elect Director Michael J. Hennigan	Mgmt	For	For	For
1.5	Elect Director Miranda C. Hubbs	Mgmt	For	For	For
1.6	Elect Director Raj S. Kushwaha	Mgmt	For	For	For
1.7	Elect Director Julie A. Lagacy	Mgmt	For	For	For
1.8	Elect Director Consuelo E. Madere	Mgmt	For	For	For
1.9	Elect Director Keith G. Martell	Mgmt	For	For	For
1.10	Elect Director Aaron W. Regent	Mgmt	For	For	For
1.11	Elect Director Ken A. Seitz	Mgmt	For	For	For
1.12	Elect Director Nelson L. C. Silva	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Manulife Financial Corp.

Meeting Date: 05/09/2024

Country: Canada

Ticker: MFC

Record Date: 03/13/2024

Meeting Type: Annual

Primary Security ID: 56501R106

Shares Voted: 46,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Nicole S. Arnaboldi	Mgmt	For	For	For
1.2	Elect Director Guy L.T. Bainbridge	Mgmt	For	For	For
1.3	Elect Director Susan F. Dabarno	Mgmt	For	For	For
1.4	Elect Director Julie E. Dickson	Mgmt	For	For	For
1.5	Elect Director J. Michael Durland	Mgmt	For	For	For
1.6	Elect Director Roy Gori	Mgmt	For	For	For
1.7	Elect Director Donald P. Kanak	Mgmt	For	For	For
1.8	Elect Director Vanessa Kanu	Mgmt	For	For	For
1.9	Elect Director Donald R. Lindsay	Mgmt	For	For	For
1.10	Elect Director Anna Manning	Mgmt	For	For	For
1.11	Elect Director C. James Prieur	Mgmt	For	For	For
1.12	Elect Director May Tan	Mgmt	For	For	For
1.13	Elect Director Leigh E. Turner	Mgmt	For	For	For
1.14	Elect Director John Wong	Mgmt	For	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Power Corporation of Canada

Meeting Date: 05/09/2024

Country: Canada

Ticker: POW

Record Date: 03/20/2024

Meeting Type: Annual

Primary Security ID: 739239101

Shares Voted: 75,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Meeting for Holders of Participating Preferred and Subordinate Voting Shares	Mgmt			
1.1	Elect Director Pierre Beaudoin	Mgmt	For	For	For
1.2	Elect Director Marcel R. Coutu	Mgmt	For	For	For
1.3	Elect Director Andre Desmarais	Mgmt	For	For	For
1.4	Elect Director Paul Desmarais, Jr.	Mgmt	For	For	For

## Power Corporation of Canada

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.5	Elect Director Gary A. Doer	Mgmt	For	For	For
1.6	Elect Director Segolene Gallienne-Frere	Mgmt	For	For	For
1.7	Elect Director Anthony R. Graham	Mgmt	For	For	For
1.8	Elect Director Sharon MacLeod	Mgmt	For	For	For
1.9	Elect Director Paula B. Madoff	Mgmt	For	For	For
1.10	Elect Director Isabelle Marcoux	Mgmt	For	For	For
1.11	Elect Director R. Jeffrey Orr	Mgmt	For	For	For
1.12	Elect Director T. Timothy Ryan, Jr.	Mgmt	For	For	For
1.13	Elect Director Siim A. Vanaselja	Mgmt	For	For	For
1.14	Elect Director Elizabeth D. Wilson	Mgmt	For	For	For
2	Ratify Deloitte LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
	Shareholder Proposals	Mgmt			
4	SP 1: Disclose the Corporation's Scope 1-3 Financed Emissions Annually	SH	Against	Against	Against
5	SP 2: Approve Incentive Compensation for All Employees Based on ESG Targets	SH	Against	Against	Against
6	SP 3: Hold Annual Meetings of the Company in Person with Virtual Meetings as Complements	SH	Against	Against	Against
7	SP 4: Disclose Language Fluency of Executives	SH	Against	Against	Against
8	SP 5: Advisory Vote on Environmental Policies	SH	Against	Against	Against

## Prologis, Inc.

**Meeting Date:** 05/09/2024

**Country:** USA

**Ticker:** PLD

**Record Date:** 03/12/2024

**Meeting Type:** Annual

**Primary Security ID:** 74340W103

**Shares Voted:** 9,387

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Hamid R. Moghadam	Mgmt	For	For	For
1b	Elect Director Cristina G. Bitá	Mgmt	For	For	For
1c	Elect Director James B. Connor	Mgmt	For	For	For
1d	Elect Director George L. Fotiades	Mgmt	For	For	For
1e	Elect Director Lydia H. Kennard	Mgmt	For	For	For

## Prologis, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1f	Elect Director Irving F. Lyons, III	Mgmt	For	For	For
1g	Elect Director Guy A. Metcalfe	Mgmt	For	For	For
1h	Elect Director Avid Modjtabei	Mgmt	For	For	For
1i	Elect Director David P. O'Connor	Mgmt	For	For	For
1j	Elect Director Olivier Piani	Mgmt	For	For	For
1k	Elect Director Carl B. Webb	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
4	Reduce Supermajority Vote Requirement to Amend Charter	Mgmt	For	For	For
5	Reduce Supermajority Vote Requirement to Amend Bylaws	Mgmt	For	For	For
6	Adopt Simple Majority Vote	SH	Against	Against	For

## TELUS Corporation

**Meeting Date:** 05/09/2024

**Country:** Canada

**Ticker:** T

**Record Date:** 03/11/2024

**Meeting Type:** Annual

**Primary Security ID:** 87971M103

**Shares Voted:** 95,301

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Raymond T. Chan	Mgmt	For	For	For
1.2	Elect Director Hazel Claxton	Mgmt	For	For	For
1.3	Elect Director Lisa de Wilde	Mgmt	For	For	For
1.4	Elect Director Victor Dodig	Mgmt	For	For	For
1.5	Elect Director Darren Entwistle	Mgmt	For	For	For
1.6	Elect Director Martha Hall Findlay	Mgmt	For	For	For
1.7	Elect Director Thomas E. Flynn	Mgmt	For	For	For
1.8	Elect Director Mary Jo Haddad	Mgmt	For	For	For
1.9	Elect Director Christine Magee	Mgmt	For	For	For
1.10	Elect Director John Manley	Mgmt	For	For	For
1.11	Elect Director David Mowat	Mgmt	For	For	For
1.12	Elect Director Marc Parent	Mgmt	For	For	For
1.13	Elect Director Denise Pickett	Mgmt	For	For	For
1.14	Elect Director W. Sean Willy	Mgmt	For	For	For

## TELUS Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
2	Approve Deloitte LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
4	Amend Deferred Share Unit Plan	Mgmt	For	For	For

## Honeywell International Inc.

**Meeting Date:** 05/14/2024      **Country:** USA      **Ticker:** HON  
**Record Date:** 03/22/2024      **Meeting Type:** Annual  
**Primary Security ID:** 438516106

Shares Voted: 7,174

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For	For
1b	Elect Director Duncan B. Angove	Mgmt	For	For	For
1c	Elect Director William S. Ayer	Mgmt	For	For	For
1d	Elect Director Kevin Burke	Mgmt	For	For	For
1e	Elect Director D. Scott Davis	Mgmt	For	For	For
1f	Elect Director Deborah Flint	Mgmt	For	For	For
1g	Elect Director Vimal Kapur	Mgmt	For	For	For
1h	Elect Director Michael W. Lamach	Mgmt	For	For	For
1i	Elect Director Rose Lee	Mgmt	For	For	For
1j	Elect Director Grace Lieblein	Mgmt	For	For	For
1k	Elect Director Robin L. Washington	Mgmt	For	For	For
1l	Elect Director Robin Watson	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Require Independent Board Chair	SH	Against	Against	Against

## Atrium Mortgage Investment Corporation

**Meeting Date:** 05/15/2024      **Country:** Canada      **Ticker:** AI  
**Record Date:** 04/10/2024      **Meeting Type:** Annual  
**Primary Security ID:** 04964G100

# Atrium Mortgage Investment Corporation

Shares Voted: 46,600

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Peter P. Cohos	Mgmt	For	For	For
1.2	Elect Director Robert H. DeGasperis	Mgmt	For	For	For
1.3	Elect Director Robert G. Goodall	Mgmt	For	For	For
1.4	Elect Director Andrew Grant	Mgmt	For	For	For
1.5	Elect Director Maurice (Maish) Kagan	Mgmt	For	For	For
1.6	Elect Director Nancy H.O. Lockhart	Mgmt	For	For	For
1.7	Elect Director Jennifer Scoffield	Mgmt	For	For	For
1.8	Elect Director Mark L. Silver	Mgmt	For	For	For
2	Approve Crowe Soberman LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For

# The Home Depot, Inc.

Meeting Date: 05/16/2024

Country: USA

Ticker: HD

Record Date: 03/18/2024

Meeting Type: Annual

Primary Security ID: 437076102

Shares Voted: 4,295

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Gerard J. Arpey	Mgmt	For	For	For
1b	Elect Director Ari Bousbib	Mgmt	For	For	For
1c	Elect Director Jeffery H. Boyd	Mgmt	For	For	For
1d	Elect Director Gregory D. Brenneman	Mgmt	For	For	For
1e	Elect Director J. Frank Brown	Mgmt	For	For	For
1f	Elect Director Edward P. Decker	Mgmt	For	For	For
1g	Elect Director Wayne M. Hewett	Mgmt	For	For	For
1h	Elect Director Manuel Kadre	Mgmt	For	For	For
1i	Elect Director Stephanie C. Linnartz	Mgmt	For	For	For
1j	Elect Director Paula Santilli	Mgmt	For	For	For
1k	Elect Director Caryn Seidman-Becker	Mgmt	For	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Adopt Policy to Require Board of Directors Members to Disclose their Political Donations	SH	Against	Against	Against

## The Home Depot, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
5	Report on Political Spending Congruency	SH	Against	Against	Against
6	Report on Corporate Contributions	SH	Against	Against	Against
7	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against	Against
8	Disclose a Biodiversity Impact and Dependency Assessment	SH	Against	Against	Against
9	Clawback of Incentive Payments	SH	Against	Against	Against

## Waste Connections, Inc.

**Meeting Date:** 05/17/2024      **Country:** Canada      **Ticker:** WCN  
**Record Date:** 03/22/2024      **Meeting Type:** Annual  
**Primary Security ID:** 94106B101

Shares Voted: 6,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Andrea E. Bertone	Mgmt	For	For	For
1b	Elect Director Edward E. "Ned" Guillet	Mgmt	For	For	For
1c	Elect Director Michael W. Harlan	Mgmt	For	For	For
1d	Elect Director Larry S. Hughes	Mgmt	For	For	For
1e	Elect Director Elise L. Jordan	Mgmt	For	For	For
1f	Elect Director Susan "Sue" Lee	Mgmt	For	For	For
1g	Elect Director Ronald J. Mittelstaedt	Mgmt	For	For	For
1h	Elect Director Carl D. Sparks	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Grant Thornton LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For

## JPMorgan Chase & Co.

**Meeting Date:** 05/21/2024      **Country:** USA      **Ticker:** JPM  
**Record Date:** 03/22/2024      **Meeting Type:** Annual  
**Primary Security ID:** 46625H100

Shares Voted: 8,900

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	For	For	For

## JPMorgan Chase & Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Stephen B. Burke	Mgmt	For	For	For
1c	Elect Director Todd A. Combs	Mgmt	For	For	For
1d	Elect Director Alicia Boler Davis	Mgmt	For	For	For
1e	Elect Director James Dimon	Mgmt	For	For	For
1f	Elect Director Alex Gorsky	Mgmt	For	For	For
1g	Elect Director Mellody Hobson	Mgmt	For	For	For
1h	Elect Director Phebe N. Novakovic	Mgmt	For	For	For
1i	Elect Director Virginia M. Rometty	Mgmt	For	For	For
1j	Elect Director Mark A. Weinberger	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Require Independent Board Chair	SH	Against	Against	Against
6	Report on Impacts of JPMC's Climate Transition Policies	SH	Against	Against	Against
7	Report on Respecting Indigenous Peoples' Rights	SH	Against	Against	Against
8	Review Proxy Voting Record and Policies Related to Climate Change and Diversity	SH	Against	Against	Against
9	Commission Third Party Report on Due Diligence Process of Doing Business in Conflict Affected Areas	SH	Against	Against	Against
10	Submit Severance Agreement to Shareholder Vote	SH	Against	Against	Against
11	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against	Against

## Mid-America Apartment Communities, Inc.

**Meeting Date:** 05/21/2024

**Country:** USA

**Ticker:** MAA

**Record Date:** 03/15/2024

**Meeting Type:** Annual

**Primary Security ID:** 59522J103

**Shares Voted:** 6,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director H. Eric Bolton, Jr.	Mgmt	For	For	For
1b	Elect Director Deborah H. Caplan	Mgmt	For	For	For
1c	Elect Director John P. Case	Mgmt	For	For	For
1d	Elect Director Tamara Fischer	Mgmt	For	For	For

## Mid-America Apartment Communities, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1e	Elect Director Alan B. Graf, Jr.	Mgmt	For	For	For
1f	Elect Director Edith Kelly-Green	Mgmt	For	For	For
1g	Elect Director James K. Lowder	Mgmt	For	For	For
1h	Elect Director Thomas H. Lowder	Mgmt	For	For	For
1i	Elect Director Claude B. Nielsen	Mgmt	For	For	For
1j	Elect Director W. Reid Sanders	Mgmt	For	For	For
1k	Elect Director Gary S. Shorb	Mgmt	For	For	For
1l	Elect Director David P. Stockert	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## McDonald's Corporation

**Meeting Date:** 05/22/2024      **Country:** USA      **Ticker:** MCD  
**Record Date:** 03/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** 580135101

Shares Voted: 5,200

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Anthony Capuano	Mgmt	For	For	For
1b	Elect Director Kareem Daniel	Mgmt	For	For	For
1c	Elect Director Lloyd Dean	Mgmt	For	For	For
1d	Elect Director Catherine Engelbert	Mgmt	For	For	For
1e	Elect Director Margaret Georgiadis	Mgmt	For	For	For
1f	Elect Director Michael Hsu	Mgmt	For	For	For
1g	Elect Director Christopher Kempczinski	Mgmt	For	For	For
1h	Elect Director John Mulligan	Mgmt	For	For	For
1i	Elect Director Jennifer Taubert	Mgmt	For	For	For
1j	Elect Director Paul Walsh	Mgmt	For	For	For
1k	Elect Director Amy Weaver	Mgmt	For	For	For
1l	Elect Director Miles White	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Amend Certificate of Incorporation to Limit the Personal Liability of Officers	Mgmt	For	For	For
4	Amend Certificate of Incorporation	Mgmt	For	For	For
5	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For	For

## McDonald's Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
6	Adopt Antibiotics Policy	SH	Against	Against	Against
7	Approve Request on Cage Free Egg Progress Disclosure	SH	Against	Against	Against
8	Disclose Poultry Welfare Indicators	SH	Against	Against	Against
9	Report on Congruency of Company's Privacy and Human Rights Policies with its Actions	SH	Against	Against	Against
10	Report on Corporate Contributions	SH	Against	Against	Against
11	Issue Transparency Report on Global Public Policy and Political Influence	SH	Against	Against	Against

## Mondelez International, Inc.

**Meeting Date:** 05/22/2024      **Country:** USA      **Ticker:** MDLZ  
**Record Date:** 03/13/2024      **Meeting Type:** Annual  
**Primary Security ID:** 609207105

Shares Voted: 8,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cees 't Hart	Mgmt	For	For	For
1.2	Elect Director Charles E. Bunch	Mgmt	For	For	For
1.3	Elect Director Ertharin Cousin	Mgmt	For	For	For
1.4	Elect Director Brian J. McNamara	Mgmt	For	For	For
1.5	Elect Director Jorge S. Mesquita	Mgmt	For	For	For
1.6	Elect Director Anindita Mukherjee	Mgmt	For	For	For
1.7	Elect Director Jane Hamilton Nielsen	Mgmt	For	For	For
1.8	Elect Director Paula A. Price	Mgmt	For	For	For
1.9	Elect Director Patrick T. Siewert	Mgmt	For	For	For
1.10	Elect Director Michael A. Todman	Mgmt	For	For	For
1.11	Elect Director Dirk Van de Put	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Approve Omnibus Stock Plan	Mgmt	For	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
5	Establish Subcommittee Study on Company Affiliations	SH	Against	Against	Against
6	Require Independent Board Chair	SH	Against	Against	Against
7	Report on Targets to Eradicate Child Labor in Cocoa Supply Chain	SH	Against	Against	Against

## Mondelez International, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
8	Report on Risks of Doing Business in Conflict-Affected Areas	SH	Against	Against	Against

## Thermo Fisher Scientific Inc.

**Meeting Date:** 05/22/2024      **Country:** USA      **Ticker:** TMO  
**Record Date:** 03/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** 883556102

Shares Voted: 2,785

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Marc N. Casper	Mgmt	For	For	For
1b	Elect Director Nelson J. Chai	Mgmt	For	For	For
1c	Elect Director Ruby R. Chandy	Mgmt	For	For	For
1d	Elect Director C. Martin Harris	Mgmt	For	For	For
1e	Elect Director Tyler Jacks	Mgmt	For	For	For
1f	Elect Director Jennifer M. Johnson	Mgmt	For	For	For
1g	Elect Director R. Alexandra Keith	Mgmt	For	For	For
1h	Elect Director James C. Mullen	Mgmt	For	For	For
1i	Elect Director Debora L. Spar	Mgmt	For	For	For
1j	Elect Director Scott M. Sperling	Mgmt	For	For	For
1k	Elect Director Dion J. Weisler	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
4	Adopt Simple Majority Vote Requirement	SH	Against	Against	Against

## UnitedHealth Group Incorporated

**Meeting Date:** 06/03/2024      **Country:** USA      **Ticker:** UNH  
**Record Date:** 04/05/2024      **Meeting Type:** Annual  
**Primary Security ID:** 91324P102

Shares Voted: 2,000

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	For	For	For
1b	Elect Director Timothy Flynn	Mgmt	For	For	For

## UnitedHealth Group Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1c	Elect Director Paul Garcia	Mgmt	For	For	For
1d	Elect Director Kristen Gil	Mgmt	For	For	For
1e	Elect Director Stephen Hemsley	Mgmt	For	For	For
1f	Elect Director Michele Hooper	Mgmt	For	For	For
1g	Elect Director F. William McNabb, III	Mgmt	For	For	For
1h	Elect Director Valerie Montgomery Rice	Mgmt	For	For	For
1i	Elect Director John Noseworthy	Mgmt	For	For	For
1j	Elect Director Andrew Witty	Mgmt	For	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For
4	Report on Congruency of Political Spending with Company Values and Priorities	SH	Against	Against	Against

## RioCan Real Estate Investment Trust

**Meeting Date:** 06/04/2024

**Country:** Canada

**Ticker:** REI.UN

**Record Date:** 04/19/2024

**Meeting Type:** Annual

**Primary Security ID:** 766910103

**Shares Voted:** 52,900

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Trustee Bonnie Brooks	Mgmt	For	For	For
1.2	Elect Trustee Richard Dansereau	Mgmt	For	For	For
1.3	Elect Trustee Janice Fukakusa	Mgmt	For	For	For
1.4	Elect Trustee Jonathan Gitlin	Mgmt	For	For	For
1.5	Elect Trustee Marie-Josée Lamothe	Mgmt	For	For	For
1.6	Elect Trustee Dale H. Lastman	Mgmt	For	For	For
1.7	Elect Trustee Jane Marshall	Mgmt	For	For	For
1.8	Elect Trustee Guy Metcalfe	Mgmt	For	For	For
1.9	Elect Trustee Edward Sonshine	Mgmt	For	For	For
1.10	Elect Trustee Siim A. Vanaselja	Mgmt	For	For	For
1.11	Elect Trustee Charles M. Winograd	Mgmt	For	For	For
2	Approve Ernst & Young LLP as Auditors and Authorize Trustees to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

# TC Energy Corporation

Meeting Date: 06/04/2024

Country: Canada

Ticker: TRP

Record Date: 04/16/2024

Meeting Type: Annual/Special

Primary Security ID: 87807B107

Shares Voted: 41,000

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cheryl F. Campbell	Mgmt	For	For	For
1.2	Elect Director Michael R. Culbert	Mgmt	For	For	For
1.3	Elect Director William D. Johnson	Mgmt	For	For	For
1.4	Elect Director Susan C. Jones	Mgmt	For	For	For
1.5	Elect Director John E. Lowe	Mgmt	For	For	For
1.6	Elect Director David MacNaughton	Mgmt	For	For	For
1.7	Elect Director Francois L. Poirier	Mgmt	For	For	For
1.8	Elect Director Una Power	Mgmt	For	For	For
1.9	Elect Director Mary Pat Salomone	Mgmt	For	For	For
1.10	Elect Director Indira Samarasekera	Mgmt	For	For	For
1.11	Elect Director Siim A. Vanaselja	Mgmt	For	For	For
1.12	Elect Director Thierry Vandal	Mgmt	For	For	For
1.13	Elect Director Dheeraj "D" Verma	Mgmt	For	For	For
2	Approve KPMG LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Approve Spin-Off Agreement with South Bow Corporation	Mgmt	For	For	Against
4	Approve Shareholder Rights Plan of South Bow Corporation	Mgmt	For	For	Against
5	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
6	SP 1: Disclosure of Board's Independent Assessment From Failing to Obtain Free, Prior, and Informed Consent of TC Energy's Projects.	SH	Against	Against	Against

# The TJX Companies, Inc.

Meeting Date: 06/04/2024

Country: USA

Ticker: TJX

Record Date: 04/08/2024

Meeting Type: Annual

Primary Security ID: 872540109

Shares Voted: 13,865

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Jose B. Alvarez	Mgmt	For	For	For

## The TJX Companies, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1b	Elect Director Alan M. Bennett	Mgmt	For	For	For
1c	Elect Director Rosemary T. Berkery	Mgmt	For	For	For
1d	Elect Director David T. Ching	Mgmt	For	For	For
1e	Elect Director C. Kim Goodwin	Mgmt	For	For	For
1f	Elect Director Ernie Herrman	Mgmt	For	For	For
1g	Elect Director Amy B. Lane	Mgmt	For	For	For
1h	Elect Director Carol Meyrowitz	Mgmt	For	For	For
1i	Elect Director Jackwyn L. Nemerov	Mgmt	For	For	For
1j	Elect Director Charles F. Wagner, Jr.	Mgmt	For	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For	For
4	Report on Effectiveness of Social Compliance Efforts in Supply Chain	SH	Against	Against	Against

## Tourmaline Oil Corp.

**Meeting Date:** 06/05/2024

**Country:** Canada

**Ticker:** TOU

**Record Date:** 04/19/2024

**Meeting Type:** Annual

**Primary Security ID:** 89156V106

**Shares Voted:** 24,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1a	Elect Director Michael L. Rose	Mgmt	For	For	For
1b	Elect Director Brian G. Robinson	Mgmt	For	For	For
1c	Elect Director Jill T. Angevine	Mgmt	For	For	For
1d	Elect Director William D. Armstrong	Mgmt	For	For	For
1e	Elect Director Lee A. Baker	Mgmt	For	For	For
1f	Elect Director Christopher E. Lee	Mgmt	For	For	For
1g	Elect Director Andrew B. MacDonald	Mgmt	For	For	For
1h	Elect Director Lucy M. Miller	Mgmt	For	For	For
1i	Elect Director Janet L. Weiss	Mgmt	For	For	For
2	Approve KPMG LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For

# Brookfield Corporation

Meeting Date: 06/07/2024

Country: Canada

Ticker: BN

Record Date: 04/18/2024

Meeting Type: Annual/Special

Primary Security ID: 11271J107

Shares Voted: 17,850

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
	Meeting for Holders of Class A Limited Voting Shares	Mgmt			
	Election of Directors (By Cumulative Voting)	Mgmt			
1.1	Elect Director M. Elyse Allan	Mgmt	For	For	For
1.2	Elect Director Angela F. Braly	Mgmt	For	For	For
1.3	Elect Director Janice Fukakusa	Mgmt	For	For	For
1.4	Elect Director Maureen Kempston Darkes	Mgmt	For	For	For
1.5	Elect Director Frank J. McKenna	Mgmt	For	For	For
1.6	Elect Director Hutham S. Olayan	Mgmt	For	For	For
1.7	Elect Director Diana L. Taylor	Mgmt	For	For	For
2	Approve Deloitte LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For
4	Approve BNRE Escrowed Stock Plan	Mgmt	For	For	For

# Canadian Apartment Properties Real Estate Investment Trust

Meeting Date: 06/10/2024

Country: Canada

Ticker: CAR.UN

Record Date: 04/11/2024

Meeting Type: Annual

Primary Security ID: 134921105

Shares Voted: 20,038

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Trustee Lori-Ann Beausoleil	Mgmt	For	For	For
1.2	Elect Trustee Harold Burke	Mgmt	For	For	For
1.3	Elect Trustee Gina Parvaneh Cody	Mgmt	For	For	For
1.4	Elect Trustee Mark Kenney	Mgmt	For	For	For
1.5	Elect Trustee Gervais Levasseur	Mgmt	For	For	For
1.6	Elect Trustee Ken Silver	Mgmt	For	For	For
1.7	Elect Trustee Jennifer Stoddart	Mgmt	For	For	For
1.8	Elect Trustee Elaine Todres	Mgmt	For	For	For

## Canadian Apartment Properties Real Estate Investment Trust

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.9	Elect Trustee Rene Tremblay	Mgmt	For	For	For
2	Approve Ernst & Young LLP as Auditors and Authorize Trustees to Fix Their Remuneration	Mgmt	For	For	For
3	Advisory Vote on Executive Compensation Approach	Mgmt	For	For	For

## Brookfield Business Corporation

**Meeting Date:** 06/20/2024      **Country:** Canada      **Ticker:** BBUC  
**Record Date:** 05/01/2024      **Meeting Type:** Annual  
**Primary Security ID:** 11259V106

Shares Voted: 8,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Cyrus Madon	Mgmt	For	For	For
1.2	Elect Director Jeffrey Blidner	Mgmt	For	For	For
1.3	Elect Director David Court	Mgmt	For	For	For
1.4	Elect Director Stephen Girsky	Mgmt	For	For	For
1.5	Elect Director David Hamill	Mgmt	For	For	For
1.6	Elect Director Anne Ruth Herkes	Mgmt	For	For	For
1.7	Elect Director John Lacey	Mgmt	For	For	For
1.8	Elect Director Don Mackenzie	Mgmt	For	For	For
1.9	Elect Director Michael Warren	Mgmt	For	For	For
1.10	Elect Director Patricia Zuccotti	Mgmt	For	For	For
2	Approve Deloitte LLP as Auditors and Authorize Board to Fix Their Remuneration	Mgmt	For	For	For

## Apollo Global Management, Inc.

**Meeting Date:** 06/24/2024      **Country:** USA      **Ticker:** APO  
**Record Date:** 04/25/2024      **Meeting Type:** Annual  
**Primary Security ID:** 03769M106

Shares Voted: 12,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Voting Policy Rec	Vote Instruction
1.1	Elect Director Marc Beilinson	Mgmt	For	For	For
1.2	Elect Director James Belardi	Mgmt	For	For	For
1.3	Elect Director Jessica Bibliowicz	Mgmt	For	For	For

# Apollo Global Management, Inc.

<b>Proposal Number</b>	<b>Proposal Text</b>	<b>Proponent</b>	<b>Mgmt Rec</b>	<b>Voting Policy Rec</b>	<b>Vote Instruction</b>
1.4	Elect Director Jay Clayton (Walter J. Clayton, III)	Mgmt	For	For	For
1.5	Elect Director Michael Ducey	Mgmt	For	For	For
1.6	Elect Director Kerry Murphy Healey	Mgmt	For	For	For
1.7	Elect Director Mitra Hormozi	Mgmt	For	For	For
1.8	Elect Director Pamela Joyner	Mgmt	For	For	For
1.9	Elect Director Scott Kleinman	Mgmt	For	For	For
1.10	Elect Director A.B. Krongard	Mgmt	For	For	For
1.11	Elect Director Pauline Richards	Mgmt	For	For	For
1.12	Elect Director Marc Rowan	Mgmt	For	For	For
1.13	Elect Director David Simon	Mgmt	For	For	For
1.14	Elect Director Lynn Swann	Mgmt	For	For	For
1.15	Elect Director Patrick Toomey	Mgmt	For	For	For
1.16	Elect Director James Zelter	Mgmt	For	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For	For