

Industry leader in screening for environmental, social and governance factors.

## Overview

KLD Consulting works with clients to create and implement social investment guidelines and strategies tailored to meet investors' specific needs.

More than two hundred clients worldwide have trusted KLD Consulting products and services.

Consulting clients include faith-based groups, money managers, foundations, pension funds, environmental and other social service organizations, and managers of socially screened annuities and mutual funds.

## Learn More

To learn more, please contact Michelle Lapolla at (617) 426-5270 x 282 or [consulting@kld.com](mailto:consulting@kld.com)

## Background Information

KLD Research & Analytics, Inc. offers a comprehensive Animal Welfare Service designed to meet the needs of institutional investors, money managers, and foundations implementing investment mandates associated with animal welfare issues.

## Investment Policy Development

KLD works as a consultant with clients to create and implement social guidelines for their investment practices. These clients include church groups, health care organizations, foundations, environmental and other social service organizations, and managers of socially screened annuities and mutual funds. Through its Animal Welfare service, KLD offers assistance in formally articulating and implementing an organization's animal welfare investment policies and screening guidelines.

## Screening Services

KLD offers animal welfare screening services identifying companies that qualify for investment and those that do not, based on a client's screening guidelines. KLD generally applies animal welfare screens to a universe comprising the largest 3,000 companies in the U.S., by market capitalization, but also offers customized universe coverage.

KLD offers portfolio audit services to ensure compliance with animal welfare screening criteria. Portfolio audits can be used in conjunction with the universe screening process, as additional due diligence, or as a stand-alone screening strategy.

## Involvement Categories

The KLD Animal Welfare Service identifies companies with involvement in the following types of activities, and can be customized to include any or all of these categories:

- Discretionary Animal Testing
- Mandatory Animal Testing
- Factory Farming
- Fur
- Leather
- Animals in Entertainment
- Other, i.e. operation of pet stores or sale of hunting equipment

## Research Process

KLD continuously updates its Animal Welfare data using press searches, company websites, information from third party providers, non-governmental and governmental organizations, company filings with the SEC, and direct contact with companies.