Company Name	Ticker Symbol	ISIN	Meeting Date	Proposal Category Description/Short Text	Proposal Long Text	Proposed By	Management Recommendation	Recorded Vote
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Lloyd A. Carney	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Kermit R. Crawford	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Francisco Javier Fernández-Carbajal	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Teri L. List	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: John F. Lundgren	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Ryan McInerney	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Denise M. Morrison	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Pamela Murphy	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: William Ready	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Linda J. Rendle	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Election of Directors (Majority Voting)	Election of Director: Maynard G. Webb, Jr.	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	14A Executive Compensation	To approve, on an advisory basis, the compensation paid to our named executive officers.	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Ratify Appointment of Independent Auditors	To ratify the appointment of KPMG LLP as our independent registered public accounting firm for fiscal year 2026.	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	Approve Director Liability Insurance	To approve amendments to our Eighth Restated Certificate of Incorporation to limit officer liability as permitted by Delaware law.	Management	For	For
VISA INC.	V	US92826C8394	27-Jan-2026	S/H Proposal - Corporate Governance	Shareholder proposal requesting the Board of Directors to adopt a policy for an independent chair.	Shareholder	Against	Against
VISA INC.	V	US92826C8394	27-Jan-2026	S/H Proposal - Corporate Governance	Shareholder proposal on shareholder right to act by written consent.	Shareholder	Against	Against
VISA INC.	V	US92826C8394	27-Jan-2026	S/H Proposal - Corporate Governance	Shareholder proposal on report on online sexual exploitation.	Shareholder	Against	Against
VISA INC.	V	US92826C8394	27-Jan-2026	S/H Proposal - Corporate Governance	Shareholder proposal on inclusion ROI audit.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Steven D. Black	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Mark A. Chancy	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Theodore F. Craver, Jr.	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Richard K. Davis	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Fabian T. Garcia	Management	For	For

WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Wayne M. Hewett	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: CeCelia G. Morken	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Maria R. Morris	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Felicia F. Norwood	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Ronald L. Sargent	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Charles W. Scharf	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Suzanne M. Vautrinot	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	14A Executive Compensation	Advisory resolution to approve executive compensation (Say on Pay).	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Amend Incentive Stock Option Plan	Proposal to amend and restate the Company's 2022 Long-Term Incentive Plan.	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	Ratify Appointment of Independent Auditors	Proposal to ratify KPMG as the Company's independent registered public accounting firm for 2026.	Management	For	For
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Establish Independent Chairman	Shareholder Proposal - Request for Board of Directors to Adopt Policy for an Independent Chair.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal - Govern by Majority Vote.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal - Energy Supply Ratio.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal - Report on High-Carbon Financing Litigation Risks.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal - Board Committee on Indigenous Peoples' Rights.	Shareholder	Against	Against
WELLS FARGO & COMPANY	WFC	US9497461015	28-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal - Report on Respecting Vendor Civil Liberties.	Shareholder	Against	Against
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Michele Burns	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Mark Flaherty	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Kimberley Harris	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: John Hess	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Kevin Johnson	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Ellen Kullman	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: KC McClure	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Thomas Montag	Management	For	For

THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Peter Oppenheimer	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: David Solomon	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: Jan Tighe	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: David Viniar	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Election of Directors (Majority Voting)	Election of Director: John Waldron	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	14A Executive Compensation	Advisory Vote to Approve Executive Compensation (Say on Pay)	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	Ratify Appointment of Independent Auditors	Ratification of PricewaterhouseCoopers LLP as our Independent Registered Public Accounting Firm for 2026	Management	For	For
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal Regarding Special Shareholder Meeting Thresholds	Shareholder	Against	Against
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	S/H Proposal - Corporate Governance	Proposal withdrawn	Shareholder	Against	Against
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal Regarding Disclosure of Energy Supply Ratio	Shareholder	Against	Against
THE GOLDMAN SACHS GROUP, INC.	GS	US38141G1040	29-Apr-2026	S/H Proposal - Corporate Governance	Shareholder Proposal Regarding Lobbying Disclosure	Shareholder	Against	Against
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	Election of Directors	DIRECTOR	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	14A Executive Compensation	Non-binding resolution to approve the compensation of the Company's Named Executive Officers, as described in the 2026 Proxy Statement.	Management	For	For
BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	14A Executive Compensation Vote Frequency	Non-binding resolution to determine the frequency (whether annual, biennial or triennial) with which shareholders of the Company shall be entitled to have an advisory vote on executive compensation.	Management	3 Years	1 Year

BERKSHIRE HATHAWAY INC.	BRKB	US0846707026	02-May-2026	S/H Proposal - Human Rights Related	Shareholder proposal requesting that the Company issue a report disclosing the Board's oversight framework for workforce and human-capital management across its operating subsidiaries.	Shareholder	Against	Against
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Sharon L. Allen	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: José (Joe) E. Almeida	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Arnold W. Donald	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Monica C. Lozano	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Maria N. Martinez	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Brian T. Moynihan	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Lionel L. Nowell III	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Denise L. Ramos	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Clayton S. Rose	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Michael D. White	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Thomas D. Woods	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Election of Directors (Majority Voting)	Election of Director: Maria T. Zuber	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	14A Executive Compensation	Approving our executive compensation (an advisory, non-binding "Say on Pay" resolution)	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	Ratify Appointment of Independent Auditors	Ratifying the appointment of our independent registered public accounting firm for 2026	Management	For	For
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	S/H Proposal - Establish Independent Chairman	Shareholder proposal requesting independent board chair	Shareholder	Against	Against
BANK OF AMERICA CORPORATION	BAC	US0605051046	04-May-2026	S/H Proposal - Animal Rights	Shareholder proposal requesting report on board oversight of risks related to animal welfare	Shareholder	Against	Against
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Michael J. Angelakis	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Thomas J. Baltimore	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: John J. Brennan	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Theodore J. Leonsis	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Deborah P. Majoras	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Karen L. Parkhill	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Charles E. Phillips	Management	For	For

AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Lynn A. Pike	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Randal K. Quarles	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Stephen J. Squeri	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Noel Wallace	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Lisa W. Wardell	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Election of Directors (Majority Voting)	Election of Director for a one year term: Christopher D. Young	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	Ratify Appointment of Independent Auditors	Ratification of appointment of PricewaterhouseCoopers LLP as independent registered public accounting firm for 2026.	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	14A Executive Compensation	Approval, on an advisory basis, of the Company's executive compensation.	Management	For	For
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	S/H Proposal - Create a Non-Discriminatory Sexual Orientation Policy	Shareholder proposal requesting a report on coverage of transgender healthcare treatments for minors.	Shareholder	Against	Against
AMERICAN EXPRESS COMPANY	AXP	US0258161092	05-May-2026	S/H Proposal - Political/Government	Shareholder proposal regarding political bias risk oversight.	Shareholder	Against	Against
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Richard D. Fairbank	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Ime Archibong	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Christine Detrick	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Suni P. Harford	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Peter Thomas Killalea	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Cornelis ("Eli") Leenaars	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: François Locoh-Donou	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Peter E. Raskind	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Eileen Serra	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Mayo A. Shattuck III	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: J. Michael Shepherd	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Craig Anthony Williams	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Jennifer L. Wong	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	14A Executive Compensation	Advisory vote on our Named Executive Officer compensation ("Say on Pay").	Management	For	For

CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	Ratify Appointment of Independent Auditors	Ratification of the selection of Ernst & Young LLP as our independent registered public accounting firm for 2026.	Management	For	For
CAPITAL ONE FINANCIAL CORPORATION	COF	US14040H1059	08-May-2026	S/H Proposal - Golden Parachutes to Vote	Stockholder proposal to require a shareholder vote on golden parachute arrangements.	Shareholder	Against	Against
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Philip Bleser	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Stuart B. Burgdoerfer	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Pamela J. Craig	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Charles A. Davis	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Roger N. Farah	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Lawton W. Fitt	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Susan Patricia Griffith	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Devin C. Johnson	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Jeffrey D. Kelly	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Barbara R. Snyder	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Election of Directors (Majority Voting)	Election of Director: Kahina Van Dyke	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	14A Executive Compensation	Cast an advisory vote to approve our executive compensation program.	Management	For	For
THE PROGRESSIVE CORPORATION	PGR	US7433151039	08-May-2026	Ratify Appointment of Independent Auditors	Ratify the appointment of PricewaterhouseCoopers LLP as our independent registered public accounting firm for 2026.	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Megan Butler	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Thomas H. Glocer	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Lynn J. Good	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Robert H. Herz	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Yasushi Itagaki	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Erika H. James	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Hironori Kamezawa	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Shelley B. Leibowitz	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Jami Miscik	Management	For	For

MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Dennis M. Nally	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Douglas L. Peterson	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Edward Pick	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Mary L. Schapiro	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Perry M. Traquina	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Election of Directors (Majority Voting)	Election of Director: Rayford Wilkins, Jr.	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	Ratify Appointment of Independent Auditors	To ratify the appointment of Deloitte & Touche LLP as independent auditor	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	14A Executive Compensation	To approve the compensation of executives as disclosed in the proxy statement (non-binding advisory vote)	Management	For	For
MORGAN STANLEY	MS	US6174464486	14-May-2026	S/H Proposal - Establish Independent Chairman	Shareholder proposal requesting an independent Board Chairman	Shareholder	Against	Against
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Hon. Sharon Y. Bowen	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Shantella E. Cooper	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Duriya M. Farooqui	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: The Rt. Hon. the Lord Hague of Richmond	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: The Rt. Hon. the Lord Hill of Oareford CBE	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Mark F. Mulhern	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Thomas E. Noonan	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Daniel E. Pinto	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Caroline L. Silver	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Jeffrey C. Sprecher	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Election of Directors (Majority Voting)	Election of Director for term expiring in 2027: Martha A. Tirinnanzi	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	14A Executive Compensation	To approve, by non-binding vote, the advisory resolution on executive compensation for named executive officers.	Management	For	For

INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Approve Article Amendments	To approve the adoption of amendments to our current Certificate of Incorporation to supplement voting and ownership limitations for regulatory compliance.	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	Ratify Appointment of Independent Auditors	To ratify the appointment of Ernst & Young LLP as our independent registered public accounting firm for the fiscal year ending December 31, 2026.	Management	For	For
INTERCONTINENTAL EXCHANGE, INC.	ICE	US45866F1049	15-May-2026	S/H Proposal - Establish Independent Chairman	A stockholder proposal regarding independent board chairman, if properly presented at the Annual Meeting.	Shareholder	Against	Against
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Linda B. Bammann	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Michele G. Buck	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Stephen B. Burke	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Alicia Boler Davis	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: James Dimon	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Alex Gorsky	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Mellody Hobson	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Phebe N. Novakovic	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Virginia M. Rometty	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Brad D. Smith	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Election of Directors (Majority Voting)	Election of Director: Mark A. Weinberger	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	14A Executive Compensation	Advisory resolution to approve executive compensation	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	Ratify Appointment of Independent Auditors	Ratification of independent registered public accounting firm	Management	For	For
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	S/H Proposal - Environmental	Report on congruence of security, resiliency, and climate initiatives	Shareholder	Against	Against
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	S/H Proposal - Establish Independent Chairman	Independent board chairman	Shareholder	Against	Against
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	S/H Proposal - Corporate Governance	Lobbying alignment	Shareholder	Against	Against
JPMORGAN CHASE & CO.	JPM	US46625H1005	19-May-2026	S/H Proposal - Corporate Governance	Sustainability ROI report	Shareholder	Against	Against
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Titi Cole	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Ellen M. Costello	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Grace E. Dailey	Management	For	For

CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: John C. Dugan	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Jane Fraser	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Duncan P. Hennes	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Peter B. Henry	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Renée J. James	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Jonathan P. Moulds	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Gary M. Reiner	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Diana L. Taylor	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: James S. Turley	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Casper W. von Koskull	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Ratify Appointment of Independent Auditors	Proposal to ratify the selection of KPMG LLP as Citi's independent registered public accounting firm for 2026.	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	14A Executive Compensation	Advisory vote to approve our 2025 Executive Compensation.	Management	For	For
CITIGROUP INC.	C	US1729674242	20-May-2026	Approve Stock Compensation Plan	Approval of additional shares for the Citigroup 2019 Stock Incentive Plan.	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Pamela Daley	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Laurence D. Fink	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Gregory J. Fleming	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: William E. Ford	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Fabrizio Freda	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Murry S. Gerber	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Margaret "Peggy" L. Johnson	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Robert S. Kapito	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Gregg R. Lemkau	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Cheryl D. Mills	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Kathleen Murphy	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Amin H. Nasser	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Gordon M. Nixon	Management	For	For

BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Adebayo Ogunlesi	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Kristin C. Peck	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Charles H. Robbins	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Hans E. Vestberg	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Susan L. Wagner	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Mark Wilson	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	14A Executive Compensation	Approval, in a non-binding advisory vote, of the compensation for named executive officers.	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Ratify Appointment of Independent Auditors	Ratification of the appointment of Deloitte LLP as BlackRock's independent registered public accounting firm for the fiscal year 2026.	Management	For	For
BLACKROCK, INC.	BLK	US09290D1019	20-May-2026	Miscellaneous Corporate Actions	Amendment of the BlackRock Finance, Inc. Certificate of Incorporation to remove the pass-through voting provision.	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Marco Alverà	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Martina Cheung	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Jacques Esculier	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Stephanie Hill	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Rebecca Jacoby	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Hubert Joly	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Ian Livingston	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Robert Moritz	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Maria Morris	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Election of Directors (Majority Voting)	Election of Director: Gregory Washington	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	14A Executive Compensation	Approve, on an advisory basis, the executive compensation program for the Company's named executive officers, as described in the Proxy Statement.	Management	For	For
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	Ratify Appointment of Independent Auditors	Ratify the appointment of Ernst & Young LLP as the Company's independent registered public accounting firm for 2026.	Management	For	For

S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	S/H Proposal - Corporate Governance	Vote on a shareholder proposal to reduce the stock ownership threshold for calling a special shareholder meeting.	Shareholder	Against	Against
S&P GLOBAL INC.	SPGI	US78409V1044	20-May-2026	S/H Proposal - Report on Charitable Contributions	Vote on a shareholder proposal to issue a report on the Company's charitable support.	Shareholder	Against	Against
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Anthony K. Anderson	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Bruce Broussard	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: John Q. Doyle	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: H. Edward Hanway	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Peter Harrison	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Judith Hartmann	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Deborah C. Hopkins	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Tamara Ingram	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Jane H. Lute	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Steven A. Mills	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Morton O. Schapiro	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Jan Siegmund	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Lloyd M. Yates	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	14A Executive Compensation	Advisory (Nonbinding) Vote to Approve Named Executive Officer Compensation	Management	For	For
MARSH & MCLENNAN COMPANIES, INC.	MRSH	US5717481023	21-May-2026	Ratify Appointment of Independent Auditors	Ratification of Selection of Independent Registered Public Accounting Firm	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Election of Directors (Majority Voting)	Election of Director for three-year term: Marianne C. Brown	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Election of Directors (Majority Voting)	Election of Director for three-year term: Frank C. Herringer	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Election of Directors (Majority Voting)	Election of Director for three-year term: Richard A. Wurster	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Election of Directors (Majority Voting)	Election of Director for three-year term: Carolyn Schwab-Pomerantz	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Ratify Appointment of Independent Auditors	Ratification of the appointment of Deloitte & Touche LLP as the company's independent registered public accounting firm for 2026	Management	For	For
THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	14A Executive Compensation	Advisory approval of named executive officer compensation	Management	For	For

THE CHARLES SCHWAB CORPORATION	SCHW	US8085131055	21-May-2026	Declassify Board	Approval of Amendments to the Certificate of Incorporation and Bylaws to declassify the Board of Directors	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Adopt Accounts for Past Year	Approval of the management report, standalone financial statements and consolidated financial statements of Chubb Limited for the year ended December 31, 2025	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Miscellaneous Corporate Actions	Allocation of disposable profit	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Dividends	Distribution of a dividend out of legal reserves (by way of release and allocation to a dividend reserve)	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Approve Financial Statements, Allocation of Income, and Discharge Directors	Discharge of the Board of Directors	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Ratify Appointment of Independent Auditors	Election of PricewaterhouseCoopers AG (Zurich) as our statutory auditor	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Ratify Appointment of Independent Auditors	Ratification of appointment of PricewaterhouseCoopers LLP (United States) as independent registered public accounting firm for purposes of U.S. securities law reporting	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Ratify Appointment of Independent Auditors	Election of BDO AG (Zurich) as special audit firm	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Evan G. Greenberg	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Michael P. Connors	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Michael G. Atieh	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Nancy K. Buese	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Nelson J. Chai	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Michael L. Corbat	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Fred Hu	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Robert J. Hugin	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Robert W. Scully	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Theodore E. Shasta	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: David H. Sidwell	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Olivier Steimer	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Director: Frances F. Townsend	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of Evan G. Greenberg as Chairman of the Board of Directors	Management	For	For

CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of the Compensation Committee of the Board of Directors: Michael P. Connors	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of the Compensation Committee of the Board of Directors: Michael L. Corbat	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of the Compensation Committee of the Board of Directors: David H. Sidwell	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Election of Directors (Majority Voting)	Election of the Compensation Committee of the Board of Directors: Frances F. Townsend	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Miscellaneous Corporate Actions	Election of Homburger AG as independent proxy	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Increase Share Capital	Renewal of a capital band for authorized share capital increases and reductions	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Approve Stock Compensation Plan	Approval of the Chubb Limited 2016 Long-Term Incentive Plan, as amended and restated	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	14A Executive Compensation	Approval of the compensation of the Board of Directors and Executive Management under Swiss law requirements: Maximum compensation of the Board of Directors until the next annual general meeting	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	14A Executive Compensation	Approval of the compensation of the Board of Directors and Executive Management under Swiss law requirements: Maximum compensation of Executive Management for the 2027 calendar year	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	14A Executive Compensation	Approval of the compensation of the Board of Directors and Executive Management under Swiss law requirements: Advisory vote to approve the Swiss compensation report	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	14A Executive Compensation	Advisory vote to approve executive compensation under U.S. securities law requirements	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Adopt Accounts for Past Year	Approval of the Sustainability Report of Chubb Limited for the year ended December 31, 2025	Management	For	For
CHUBB LIMITED	CB	CH0044328745	21-May-2026	Miscellaneous Corporate Actions	If a new agenda item or a new proposal for an existing agenda item is put before the meeting, I/we hereby authorize and instruct the independent proxy to vote as follows: For = In accordance with the position of the Board of Directors Against = Against new items and proposals Abstain = Abstain on new items and proposals	Management	For	For

KKR & CO. INC.	KKR	US48251W1045	21-May-2026	Eliminate Supermajority Requirements	An amendment to the Company's Second Amended and Restated Certificate of Incorporation (the "Existing Charter") to remove the supermajority voting requirements for stockholders to amend certain provisions of the Company's Existing Charter.	Management	For	For
KKR & CO. INC.	KKR	US48251W1045	21-May-2026	Miscellaneous Corporate Actions	An amendment to the Existing Charter to establish stockholders' meetings as the sole mechanism for approval of matters on which holders of common stock are required or permitted to vote.	Management	For	For
KKR & CO. INC.	KKR	US48251W1045	21-May-2026	Authorize Board to Fill Vacancies	An amendment to the Existing Charter to grant the Board the sole authority to fill board vacancies and newly created directorships.	Management	For	For
KKR & CO. INC.	KKR	US48251W1045	21-May-2026	Approve Article Amendments	Other amendments to the Existing Charter to modernize and streamline the Existing Charter.	Management	For	For
KKR & CO. INC.	KKR	US48251W1045	21-May-2026	Approve Motion to Adjourn Meeting	The adjournment of the Special Meeting, from time to time, if necessary or appropriate, to solicit additional proxies if there are not sufficient votes in favor of any of the amendments to the Existing Charter.	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Merit E. Janow	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Candido Bracher	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Richard K. Davis	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Julius Genachowski	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Choon Phong Goh	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Oki Matsumoto	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Michael Miebach	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Youngme Moon	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Gabrielle Sulzberger	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Harit Talwar	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Election of Directors (Majority Voting)	Election of Director: Lance Uggla	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	14A Executive Compensation	Advisory approval of Mastercard's executive compensation	Management	For	For
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	Ratify Appointment of Independent Auditors	Ratification of the appointment of PricewaterhouseCoopers LLP as the independent registered public accounting firm for Mastercard for 2026	Management	For	For

MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	S/H Proposal - Corporate Governance	Consideration of a stockholder proposal regarding shareholder right to act by written consent	Shareholder	Against	Against
MASTERCARD INCORPORATED	MA	US57636Q1040	16-Jun-2026	S/H Proposal - Adopt Cumulative Voting	Consideration of a stockholder proposal to adopt cumulative voting for the election of directors	Shareholder	Against	Against