

As Seen in The Wall Street Journal



Boston Trust Wealth Management Team (clockwise from top left): David Sandell, Amy Crandall Kaser, Jason O'Connell, Kimberly Gluck, Stephen Amyouny, Heidi Vanni, Domenic Colasacco.

Boston Trust & Investment Management Company

Walden Asset Management

The team at Boston Trust is invested in far more than financial markets. As a 100 percent employee-owned firm, many of its 60 staff members own a stake in the company. “This is an incredibly important factor in shaping the culture of the firm,” says Stephen Amyouny, managing director and director of equity research. “This allows for the alignment of the company’s business model with our clients’ long-term investment horizon and goals, while simultaneously giving us the ability to attract and retain exceptional professionals.” In fact, the same diverse leadership team has been in place for well over a decade with Domenic Colasacco, CEO at the helm since 1980. “Domenic has been a tremendous leader and thoughtful steward of our firm. His consistent voice and leadership over the years is reflected in the stability of our client base.”

It is this stability combined with the firm’s investment strategies and socially responsible investing through its Walden Asset Management brand that differentiate Boston Trust. “As a firm we are very committed to producing attractive after-fee, after-tax, risk-adjusted returns,” says Amyouny. “Managing risk is a core component of our approach, and no decisions are made without consideration of return potential, risks of the underlying investments, and tax implications.”

To accomplish these goals, the firm customizes solutions and manages proprietary mutual funds to meet the needs of its diverse client base, which is comprised of high net worth individuals, families and institutional clients, including private foundations, endowments and large institutional clients, such as state and city pension funds. “All clients benefit from these institutional caliber investment solutions as well as direct access to the people who manage them,” adds portfolio manager Jason O’Connell.

The firm’s depth and breadth of research, experience and investment strategies result in a set of portfolios comprised of reasonably priced

stocks of high quality companies with carefully considered sector and industry exposures. Some of the company’s proprietary mutual funds have been recognized by third-party data providers.

For the growing number of clients interested in socially responsible investing (also known as “impact” investing), Walden Asset Management (a division within Boston Trust) gives clients the ability to use their position as shareholders to advocate for environmental and social change. “Over a third of client assets are managed under the Walden brand,” says Kimberly Gluck, managing director. “We strive to create portfolios for clients that align with their personal values or organizational mission.” In this rapidly growing part of the investment universe, Boston Trust and Walden have been leaders in environmental, social and governance (ESG) research and shareholder engagement for more than 40 years.

“At the end of the day, our clients want to feel very secure,” says Amyouny. “While the financial landscape has changed, our clients’ objectives have not. They are seeking long-term financial security, including generational wealth transfer, through prudent investing and planning. As a firm, we are very transparent. Clients know what they are investing in and what they are paying for. Our relationships are based on mutual trust. We take that responsibility very seriously and value that trust.”

**BOSTON TRUST & INVESTMENT
MANAGEMENT COMPANY
WALDEN ASSET MANAGEMENT**

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