



# SEMI ANNUAL PROGRESS REPORT

## SRI\* PORTFOLIO COMPANY INFORMATION

APPENDIX D3

Please complete this form for each/every portfolio company that your firm deems as being SRI oriented in terms of the statement below.

\*Socially responsible investing (SRI), also known as sustainable, socially conscious, "green" or ethical investing, is any investment strategy which seeks to consider both financial return and social good. In general, socially responsible investors encourage corporate practices that promote environmental stewardship, consumer protection, human rights, and diversity. The areas of concern recognized by the SRI industry are sometimes summarized as ESG issues: environment, social justice, and corporate governance.

### GENERAL INFORMATION

COMPANY NAME:

STREET ADDRESS:

WEBSITE:

CURRENT PORTFOLIO STATUS? IF EXITED, PROVIDE DATE OF EXIT.

NAME OF COMPANY CEO OR BEST CONTACT:

TITLE:

EMAIL:

PHONE:

### INVESTMENT INFORMATION

TOTAL INVESTMENT FROM YOUR FUND TO DATE:DATE OF YOUR FIRST INVESTMENT:COMPANY MOVE TO PA FROM YOUR INVESTMENT:

### SRI ATTRIBUTES

BRIEF DESCRIPTION OF SRI ATTRIBUTES: