



Crossmark Global Investments Launches First Socially Responsible Covered Call Mutual Fund

Income-generating investment fund features proprietary values-based screens

Houston, Texas – January 8, 2018 – Crossmark Global Investments, Inc. (Crossmark), a leading provider of responsible investment solutions, announced today the launch of the Crossmark Steward Covered Call Income Fund (Ticker: SCJIX), which seeks to provide investors with dividend income and options premium income, with the potential for capital appreciation and less volatility than the broad equity market.

The Steward Covered Call Income Fund is managed by Paul Townsen, Managing Director at Crossmark Global Investments and a 24-year member of the firm’s equity investment team, and Zachary Wehner, Portfolio Manager. The portfolio management team buys a basket of stocks and writes (or sells) call options to cover the stock positions. In doing so, the strategy is intended to enhance portfolio returns in certain market conditions and reduce volatility. This approach may be appropriate for investors looking for enhanced income, capital appreciation potential, and reduced risk levels by treating volatility as an asset class.

As the first buy/write mutual fund in the Steward Family of Funds, the Fund will apply Crossmark’s proprietary Steward Screens, which screen for widely held traditional values, excluding companies materially involved with alcohol, tobacco, gambling, life ethics, and mature content. The same screening process is applied to the five other values-based equity and fixed income funds that together constitute Crossmark’s Steward Fund suite.

“With equities continuing to rise as we approach the ninth year of the bull market, investors and financial advisors are increasingly seeking conservative alternatives to traditional equity investing,” Mr. Townsen said. “Covered call strategies can fit this need very effectively, generating steady income through dividends and option premiums. Our covered call mutual fund allows investors to access this return profile without compromising their personal convictions.”

Mr. Townsen has over 10 years of experience managing covered call strategies at Crossmark. This experience through different market cycles formed the basis for creating the Steward Covered Call Income Fund.

David Rentfrow, Managing Director and Head of Distribution at Crossmark, added: “Our covered call strategy addresses two major demographic shifts that are dominating the investment industry: the aging population that is increasingly looking for conservatively-managed, income-generating



investments, and the rising number of investors who are seeking to align their investment portfolios with their values.”

In addition to launching the new Fund, Crossmark has enhanced its Steward Fund suite with the addition of “clean shares” and class C-shares.

To learn more about Crossmark, visit the firm’s website, crossmarkglobal.com, or LinkedIn page.

About Crossmark’s Steward Funds:

Crossmark is the exclusive manager of the award-winning Steward Funds, a family of values-based screened mutual funds that currently includes the Steward Large Cap Enhanced Index Fund, Steward Small-Mid Cap Enhanced Index Fund, Steward International Enhanced Index Fund, Steward Select Bond Fund, Steward Global Equity Income Fund, and now the Steward Covered Call Income Fund.

Before investing in a mutual fund, you should read the fund’s prospectus carefully and consider the fund’s investment objectives, risks, charges and expenses. The prospectus contains this and other information about the fund. A copy of the Steward Funds’ prospectus may be obtained free of charge by calling Crossmark Distributors at 800-262-6631 or by visiting the Funds’ website at: crossmarkglobal.com/stewardfunds

About Crossmark Global Investments:

Crossmark Global Investments is an independent investment advisor headquartered in Houston, Texas. Founded in 1987, the firm serves retail and institutional investors across the country. Crossmark is the exclusive manager of the award-winning Steward Funds, a family of values-based screened funds. **The Steward Funds are offered by Crossmark Distributors, Inc., member FINRA/SIPC.**

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