

## **Crossmark Global Investments Appoints Rob Botard as Managing Director and Equity Portfolio Manager**

### ***John Wolf to retire following 27 years at Crossmark***

**Houston, Texas – June 1, 2022** - Crossmark Global Investments, a faith-based investment management firm, is pleased to announce that Rob Botard has joined the firm as Managing Director and Equity Portfolio Manager. Mr. Botard will assume the responsibilities of John Wolf, who will retire at the end of the year after 27 years at Crossmark.

Mr. Wolf's leadership and investment approach played a crucial role in the launch of both the Crossmark Global Equity Income Strategy and Steward Global Equity Income Fund. Under Mr. Wolf's management, the Steward Global Equity Income Fund won the Lipper Fund Award for Best Global Equity Income Fund over multiple time periods, for eight consecutive years.

"Mr. Wolf's contributions to our firm have been invaluable, as he has strengthened our flagship strategy and provided clients with the option to align their investments with their values," said Robert C. Doll, Chief Investment Officer of Crossmark. "We are confident that Mr. Botard will carry out the time-tested investment philosophy and process expected by our clients."

In his role, Mr. Botard will oversee both the Crossmark Global Equity Income Strategy and the Steward Global Equity Income Fund. Crossmark hired Mr. Botard after an extensive search to identify a portfolio manager successor that brings the quantitative and qualitative skills as an investor coupled with the dedication to execute Global Equity Income's investment strategy. Prior to joining Crossmark, Mr. Botard served as a portfolio manager at Invesco, focusing primarily on the company's Diversified Dividend and Dividend Income strategies. He began his career at Criterion Investments and later moved to AIM/Invesco where he also held roles in quantitative equity analysis and as a derivatives trader.

"Throughout my career, I have been drawn to support companies that have a clear mission of prioritizing ethics and social responsibility," said Mr. Botard. "I look forward to serving as a portfolio manager for Crossmark Global Investments and helping clients in their pursuit to align their investments with their values."

Crossmark has planned a thoughtful transition over the next seven months for Mr. Wolf to prepare Mr. Botard for this transition alongside Brent Lium, Head of Equities, who will continue as co-PM.

### **About Crossmark Global Investments**

Crossmark Global Investments is a faith-based firm that creates, manages, and distributes values-based investment strategies that equip financial intermediaries and their clients to align their wealth with their passions and convictions. For over 30 years, the firm has delivered uniquely constructed products based on its proprietary, disciplined, and repeatable process.

Founded in 1987, the firm is headquartered in Houston, Texas. For more information, visit [crossmarkglobal.com](http://crossmarkglobal.com)

**Crossmark Global Investments, Inc. (Crossmark)** is an investment adviser registered with the Securities and Exchange Commission that provides discretionary investment management services to mutual funds, institutions, and individual clients. Information and recommendations contained in market commentaries and writings are of a general nature and are not intended to be construed as investment, tax or legal advice. Investment advice can be provided only after the delivery of Crossmark's firm Brochure and Brochure Supplement (Form ADV Parts 2A and 2B) and once a properly executed investment advisory agreement has been entered into by the client. **All investments are subject to risks, including the possible loss of principal.**

**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. To obtain Fund performance as of the most recent month-end or to obtain a copy of the Steward Funds' prospectus free of charge, call Crossmark Distributors at 888.845.6910.**

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Equity investments generally involve two principal risks—market risk and selection risk. The value of equity securities will rise and fall in response to general market and/or economic conditions (equity market risk). The value of any individual equity security will rise and fall in response to the market's perception of the issuer's revenues, earnings, balance sheet, creditworthiness, business plan, and overall perception of the viability of the issuer's business (selection risk). Investments in securities of issuers in foreign countries involve additional risks not associated with domestic investments. These risks include but are not limited to: (1) political and financial instability; (2) currency exchange rate fluctuations; (3) greater price volatility and less liquidity in particular securities and in certain foreign markets; (4) lack of uniform accounting, auditing, and financial reporting standards; (5) less government regulation and supervision of some foreign stock exchanges, brokers and listed companies; (6) delays in transaction settlement in certain foreign markets; (7) less availability of information; and (8) imposition of foreign withholding or other taxes.

The Fund's values-based screening policies exclude certain securities from the universe of otherwise available investments. As a result, the Fund may not achieve the same performance it otherwise may have in the absence of the screening process. If the Fund has invested in a company that is later discovered to be in violation of one or more screening criteria and liquidation of an investment in that company is required, selling the securities at issue could result in a loss for the Fund.

Refinitiv Lipper recognized the Steward Global Equity Income Fund at the U.S. Lipper Fund Awards on March 10, 2022, for delivering consistently strong risk-adjusted performance relative to its peers in the Global Equity Income Funds category for the ten-year period ending

11/30/2021. The number of peer funds included in the category was 14 for the ten-year category.

The Refinitiv Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The Refinitiv Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a risk-adjusted performance measure calculated over 36, 60, and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the Refinitiv Lipper Fund Award. For more information, see [lipperfundawards.com](http://lipperfundawards.com). Although Refinitiv Lipper makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Refinitiv Lipper.

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