



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

The Third Annual  
*WealthBriefing*  
Wealth For Good  
Awards 2024



July 2024



We align with  
*your goals*

Helping clients define and pursue their  
wealth and investment management  
goals for over 65 years.

**GLENMEDE**

# Glenmede's Sustainable And Impact Investing Platform: An Enduring Approach To Helping Our Clients Align Their Portfolios With Values



## What does your firm do to push forward ESG and sustainable investing that is different than its peers?

Our approach is differentiated due to its alignment with Glenmede's core value proposition: to serve as reliable stewards for our clients. This foundational pledge has resulted in a sustainable and impact investing platform that is not siloed, but rather, is a core part of the rigorous, fiduciary-backed processes we have relied on for nearly 70 years.

Our platform is designed to help clients connect their investments with their organisational or personal values. Utilizing environmental, social, and governance information as part of the investment process, the team's investment and impact measurement capabilities enable us to meet clients where they are across a wide range of motivations. In a space that is still often opaque, we offer 50+ investment strategies clearly categorized across integrated, mandated, thematic, and high impact concessionary approaches that are underpinned by fiduciary guidelines and customised impact measurement. Importantly, these strategies are underwritten as part of our standard investment committee process that seeks to consider strategies on traditional financial merits. This allows us to both customise portfolios to a wide range of impact related goals, while remaining focused on financial based metrics.



## Glenmede Trust Company

### How did the team of colleagues work to make this achievement possible?

Expanding the department and internal training programs allowed us to increase the value we offer to our clients. Recently, we hired two new dedicated SII team members to add to our team, including our first Climate Change Investing Specialist, and developed more than 50 "Sustainable and Impact Investing Experts" across the firm. Together, this has allowed us to ingrain and scale efforts into our core business offering.

### How do you intend to sustain your standards and take things to a higher level?

As Glenmede positions itself for the next chapter of sustainable and impact investing in 2025 and beyond, we have asked ourselves a key question: how do we ensure we are integrating emerging research, continuing to build out thematic and high impact investment strategies, and offering superior tools for our clients to measure their impact in practice?

We believe in the power of partnerships to help us answer this question. We plan to continue to leverage our Sustainable Investing Advisory Council, comprised of industry-leading experts across academia, law, foundations, and institutional investing, as well as partnerships with NYU's Center for Sustainable Business, MIT Solve, and Wharton's ESG Initiative to help us best position in what is a fast-evolving marketplace.

### What does this award mean for you and your clients?

Our north star across everything we do is to enhance our ability to help individuals and families achieve their goals. This award presents significant market recognition for our approach and offers us a greater amplification to do so in practice. We are excited to have the opportunity to connect with/support new audiences, please do not hesitate to reach out.



# GLOBAL AWARDS

Showcasing The Best in the Industry

Independence,  
integrity and  
genuine insight  
are the  
watchwords  
of the judging  
process.

## 2024/2025 Announcements Schedule

**3 OCTOBER 2024**  
WealthBriefingAsia EAM Awards

**21 NOVEMBER 2024**  
WealthBriefing MENA Awards

**5 DECEMBER 2024**  
WealthBriefing Channel Islands Awards

**16 JANUARY 2025**  
Miami Family Wealth Report Awards  
incorporating Latin America & the Caribbean

**6 & 20 FEBRUARY 2025**  
WealthBriefing Swiss Awards  
WealthBriefing WealthTech Americas Awards

**5 & 27 MARCH 2025**  
WealthBriefing Swiss EAM Awards  
WealthBriefing European Awards

**8 MAY 2025**  
Family Wealth Report Awards

**5 & TBC JUNE 2025**  
WealthBriefingAsia & Greater China Awards  
WealthBriefing Wealth For Good Awards



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