Boston Trust Walden
Principled Investing.

Revised 08/20/2025

FACTS	WHAT DO BOSTON TRUST WALDEN COMPANY AND BOSTON TRUST WALDEN INC. (Collectively "Boston Trust Walden" or "BTW") DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect, and share depend on the product or service you have with us. This information can include: ▪ Social Security Number and Account Balances ▪ Account Transactions and Wire Transfer Instructions ▪ Assets and Checking Account Information When you are no longer our customer, we continue to share your information as described in this notice.
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Boston Trust Walden chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information:	Does Boston Trust Walden share?	Can you limit this sharing?
For our everyday business purposes such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes to offer our products and services to you	No	We Don't Share
For joint marketing with other financial companies	No	We Don't Share
For our affiliates' everyday business purposes information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes information about your credit worthiness	No	We Don't Share
For our affiliates to market to you	No	We Don't Share
For non-affiliates to market to you	No	We Don't Share
Questions?	Call Valerie Quinones, Director of Risk Management at (617) 726-7056 or toll-free at (800) 282-8782	

Who we are	
Who is providing this notice?	Boston Trust Walden Company, a bank and trust company located in the Commonwealth of Massachusetts and Boston Trust Walden Inc., a SEC registered investment adviser
What we do	
How does Boston Trust Walden protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Boston Trust Walden collect my personal information?	We collect your personal information, for example, when you: ▪ Open an account with us or Show us your government-issued ID ▪ Make a wire transfer or Give us your contact information ▪ Tell us about your investment or retirement portfolio
Why can't I limit all sharing?	Federal law gives you the right to limit only • sharing for affiliates' everyday business purposes- information about your creditworthiness • affiliates from using your information to market to you • sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • *Boston Trust Walden Inc., an SEC registered investment adviser*
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • *Non-affiliates we share with include vendors engaged to provide services that support our client service needs*
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. • *Boston Trust Walden has no joint marketing agreements*
Other Important Information	
For California Residents: We will not share information we collect about you with non-affiliated third parties, except as permitted by California law, such as to process your transactions or to maintain your account.	