Sage Advisory Services

Locations: Texas (HQ)
Industries: Diversified Financials

RISK LEVEL:

Lower Risk

DESCRIPTION:

Sage Advisory Services is Lower Risk. The company does not yield to political activism in shaping corporate governance, preventing initiatives that potentially alienate consumers, divide employees, and harm shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. Overall, Sage Advisory Services does not embrace corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues. This approach protects free exercise, free speech, and free enterprise.

Corporate Weaponization

Has canceled customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. **Lower Risk**

Sage has not publicly canceled customers, suppliers, or vendors based on political views or religious beliefs (1).

Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. **N/A**

Sage does not publish a nondiscrimination policy (1).

Employment policies fail to protect against viewpoint or other discrimination and/or are ideological in nature. **Lower Risk**

Sage Advisory protects its employees against viewpoint discrimination (1).

Corporate Governance and Public Policy

Uses corporate reputation to support causes, organizations, or policies hostile to freedom of expression. **Medium Risk**

Sage supports DEI within its business practices, employing a DEI Committee (1). The company supports DEI within its business practices. From its Diversity, Equity & Inclusion Policy: "Sage is committed to fostering, cultivating, and preserving a culture of diversity, equity, and inclusion. This is reflected in our core values and firm policies" (2). The company is a signatory to the CFA

Institute's Diversity, Equity, and Inclusion Code, indicating its support of DEI in its recruitment, hiring, onboarding, and promotions. Furthermore, the company pledges to integrate DEI into its policies, promote DEI in the investment industry, and provide regular reporting on its DEI metrics to the CFA Institute (3)(4)(5)(6). The company was part of the Net Zero Asset Managers initiative, committed to carbon neutrality with its investments by 2050 (7)(8)(9).Otherwise, there are no publicly known cases of the company using its reputation to advance ideological causes or policies (10).

Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression. **Lower Risk**

Sage has not used corporate funds to advance ideological causes, organizations, or policies (1).

Uses corporate political actions and/or financial contributions for ideological, non-business purposes. **N/A**

Sage does not operate a PAC or engage in lobbying at this time (1)(2)(3).

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