



## Sageview

Locations: California (HQ)  
Industries: Diversified Financials

RISK LEVEL:



Medium Risk

### DESCRIPTION:

Sageview is Medium Risk. The company often yields to political activism in shaping corporate governance, potentially alienating consumers, dividing employees, and harming shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. The company occasionally embraces corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues at times. This approach fails to safeguard 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. Medium Risk**

*Sageview integrates ESG into its business practices. From its Team page: The company's Director over Retirement Plan Consulting "[Sarah Parker] specializes in investment oversight and design, alternative investments, ESG implementation, ERISA compliance, vendor management, managed accounts, and financial wellness" (1). However, the company has not canceled customers, suppliers, or vendors based on political views or religious beliefs (2).*

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

*Sageview does not appear to discriminate against charitable organizations based on views or beliefs (1). Sageview Foundation's charitable giving focus areas are Hope International, Orange County Rescue Mission, and Edify (2).*

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

*Sageview appears to prioritize diversity over merit in its recruitment. From its The SageView Story page: "Recruitment, retention and development of a diverse range of talented individuals" (1). The company does not provide viewpoint protections for its employees (2).*

### Corporate Governance and Public Policy

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

*Sageview supports DEI within its business practices. From its The SageView Story page: "We hope that this policy, combined with both internal and external diversity and inclusion initiatives, will make SageView Advisory Group a model organization for DEIB" (1). Otherwise, the company has not supported ideological causes or policies (2).*

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

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

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

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

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