



Crossmark Announces New Roles for Andrew Cullivan and Rob Botard

Houston, Texas – June 21, 2024 – Crossmark Global Investments, a faith-based firm offering values-based investments, announced today that Andrew Cullivan, CFA[®], will assume the role of Lead Portfolio Manager for Steward International Enhanced Index Fund, Steward Values-Focused Large Cap Enhanced Index Fund, and Steward Values-Focused Small-Mid Cap Enhanced Index Fund, effective immediately. In addition, Rob Botard, CFA[®], currently Lead Portfolio Manager for the Steward Global Equity Income Fund and the firm's Global Equity Income SMA strategy, will assume the additional role of Head of Equity Investments effective August 27, 2024.

Andrew Cullivan joined the firm in April 2024 and is responsible for managing Crossmark's enhanced index products and custom equity index solutions. Prior to joining Crossmark, Andrew spent over a decade in the financial services industry, most recently serving as a portfolio manager for First Trust Direct Indexing L.P. (formerly Veriti Management; acquired by First Trust Capital Partners, LLC). During that time, Andrew developed and implemented a systematic investment platform for management and trading of customized separately managed accounts with a focus on direct-indexing strategies, including values-aligned strategies for institutional clients and tax-aware strategies for high-net-worth investors. Crossmark hired Andrew after an extensive search to identify a portfolio manager who specializes in systematic portfolio management focused on rules-based, quantitative processes and risk management.

Rob Botard has more than 30 years of investment experience and has worked on several different portfolio management teams and strategies in his career. In addition to his role as Lead Portfolio Manager for the Steward Global Equity Income Fund and the firm's Global Equity Income SMA strategy, he serves as Co-Manager of several Steward funds. Prior to joining Crossmark, Rob held senior roles at Invesco in Quantitative Analysis, Derivative Trading, and as a Portfolio Manager for Equity Dividend strategies. His leadership within the investments team and his experience in prior roles make him a clear



choice for his new responsibilities. As Head of Equity Investments, Rob will report to Bob Doll, Crossmark's CEO and Chief Investment Officer.

Crossmark also announced that Brent Lium, CFA[®], current Head of Equity Investments and Lead Portfolio Manager of several Steward funds, will be leaving the firm to pursue other opportunities, effective August 27, 2024. Crossmark has planned a thoughtful transition of Brent's responsibilities to Andrew and Rob, allowing ample overlap in responsibilities to facilitate a seamless transition. Crossmark is grateful for the contributions Brent has made and for his leadership in developing the investments team since joining the firm in 2019 and wishes him all the best in his future endeavors.

Bob Doll, CEO/CIO, stated, "We are pleased to announce new roles for Andrew Cullivan and Rob Botard. Their talent and expertise, alongside my role as CEO/CIO and Victoria Fernandez's role as Chief Market Strategist and Head of Fixed Income, will further reinforce the strength and experience of Crossmark's leadership team."

About Crossmark Global Investments:

Crossmark Global Investments is a faith-based firm that creates and manages values-based investment strategies for financial intermediaries and their clients. Founded over 35 years ago, the firm has a rich history of inspiring and equipping its clients to go further in aligning their investments with their values. Crossmark is based in Houston, Texas. The firm reported \$6.7 billion in AUM as of March 31, 2024, via both separately managed accounts and the Steward family of mutual funds invested across equity, fixed income, liquid alternative, and derivative income asset classes. For more information, visit crossmarkglobal.com.

The Steward Funds are distributed by Crossmark Distributors, Inc., member FINRA, an affiliate of Crossmark. Crossmark Distributors is an affiliate of Crossmark Global Investments, Inc., the Steward Funds' investment adviser. Crossmark Global Investments is an investment adviser registered with the Securities and Exchange Commission that provides discretionary investment management services to mutual funds, institutions, and individual clients. **All Investments are subject to risks, including the possible loss of principal. Past performance does not guarantee future results. 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. A copy of the Steward Funds' prospectus may be obtained free of charge**



by calling Crossmark Distributors at 888-845-6910. Past performance does not guarantee future results.

The funds may not achieve their objectives if the managers' expectations regarding particular securities or markets are not met. 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, credit worthiness, 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. Stocks of smaller, less seasoned companies are generally subject to greater price fluctuations, less liquidity, higher transaction costs and higher investment risk than those of larger, more seasoned issuers. Smaller companies may have limited product lines, markets or financial resources, and they may be dependent on a limited management group or lack substantial capital reserves or an established performance record. There is generally less publicly available information about such companies than for larger, more established companies. The funds' values-based screening policies exclude certain securities from the universe of otherwise available investments. As a result, the funds may not achieve the same performance they otherwise may have in the absence of the screening process. If the funds have 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 funds. Further, the funds' values-based screening policies may prevent the funds from participating in an otherwise suitable investment opportunity. Investment return and principal value will fluctuate so that shares, when redeemed, may be worth more or less than their original cost. The funds' current performance may be lower or higher than quoted.