Align your personal values with your financial goals.

Incapital's Legacy™ platform provides access to values-based investments. Values-based investing, also called environmental, social and governance (ESG) investing, means choosing investments with a mission that aligns with what matters to you.

Our Legacy™ investments are issued by:

Nonprofit organizations focused on creating positive social change through healthcare, education, affordable housing and community development

Organizations making loans and funding projects with an environmental focus, such as energy, climate change, agriculture and forestry, transportation, waste and pollution

International development organizations committed to reducing poverty, increasing shared prosperity and promoting sustainable development by partnering with governments and the private sector

You can work with your financial advisor to select areas of focus and impact, then choose from Legacy™ offerings that may include:

- Corporate Bonds, including InterNotes®
- U.S. Agency and Supranational Bonds
- Certificates of Deposit (CDs)
- Market-Linked CDs and Notes

Know Your Impact

Incapital's Legacy™ platform makes it easy to identify ESG investments. By selecting individual issuers, you can be intentional with your investments to meet specific values-based objectives. The impact is measurable, so you can evaluate how your money helps generate positive outcomes.

Values-Based Return

You don't have to sacrifice the potential for financial return while supporting your social impact goals. Legacy™ provides choices that support personal values and your financial goals. As you develop your investment strategy with your advisor, Legacy™ offerings can be a part of your fixed income allocation.

A Legacy to Pass Down

Legacy™ offerings are designed to help you generate targeted impact today and for generations to come. Social returns can create lasting, positive change.

To learn more, speak with your financial advisor or visit **Incapital.com/Legacy.**

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