

Opening access to private market investments that target non-correlated competitive returns.

OUR PRIVATE MARKET PHILOSOPHY:

Private Investment Diligence

Many of our clients own private assets. Private investments serve to diversify risk from public markets, while providing non-correlated and competitive returns. We work with our clients to understand their private assets, all which have uniquely idiosyncratic characteristics from private businesses or private funds to private land deals. When requested, we provide due diligence, oversight and advisement.

Through our deep financial networks, we have access to numerous private investment opportunities. These private investments can be direct deals or structured through trusted partnerships. We work closely with our clients to understand their objectives to determine if private investments fit with their long-term financial goals and values.

We take pride in the level of due diligence and service we bring to all our clients' private holdings. Based on our long track record in the private investment space, we bring a deep bench of knowledge to the table.

As with all our investments, we integrate Environment, Social and Governance (ESG) criteria into our diligence. This allows us to review private partnerships, funds and companies for informed practices that exhibit operational excellence, capitalize on growth opportunities, mitigate risks and align with stakeholder interests. Typical private market due diligence includes:

- Market Analysis
- Comparative Risk & Reward
- Strategy and Process
- Track Record
- Team
- Fund Structure / Terms
- Legal Review

We have assisted clients in a variety of private investment advisory needs, and offer expertise across a wide array of investment types:

- Private Equity
- Venture
- Real Estate
- Timber
- Agriculture
- Private Debt
- Promissory Notes
- Community Investment Notes
- Hedge Funds

Many clients have a deep desire to examine their impact in the world. For decades we have enjoyed working with these individuals and families to successfully integrate impact investing into their portfolios.

IMPACT INVESTING:

Our Impact Investment Philosophy: Private Investments Designed to Unlock Environmental or Social Solutions

Across the world there is increasing interest in Impact Investing. There are many different definitions for what “impact” really means. We regard impact investing as directing private investments where its intention is to generate beneficial social or environmental impact -- along with financial returns. While some consider impact investing across all asset classes and strategies, we generally equate impact investing with direct, private investments where debt or equity capital can catalyze progress. We marry our belief that great businesses are run by great people, with finding solutions based investments benefiting social or environmental outcomes.

IMPACT INVESTING GLOBAL DRIVERS:

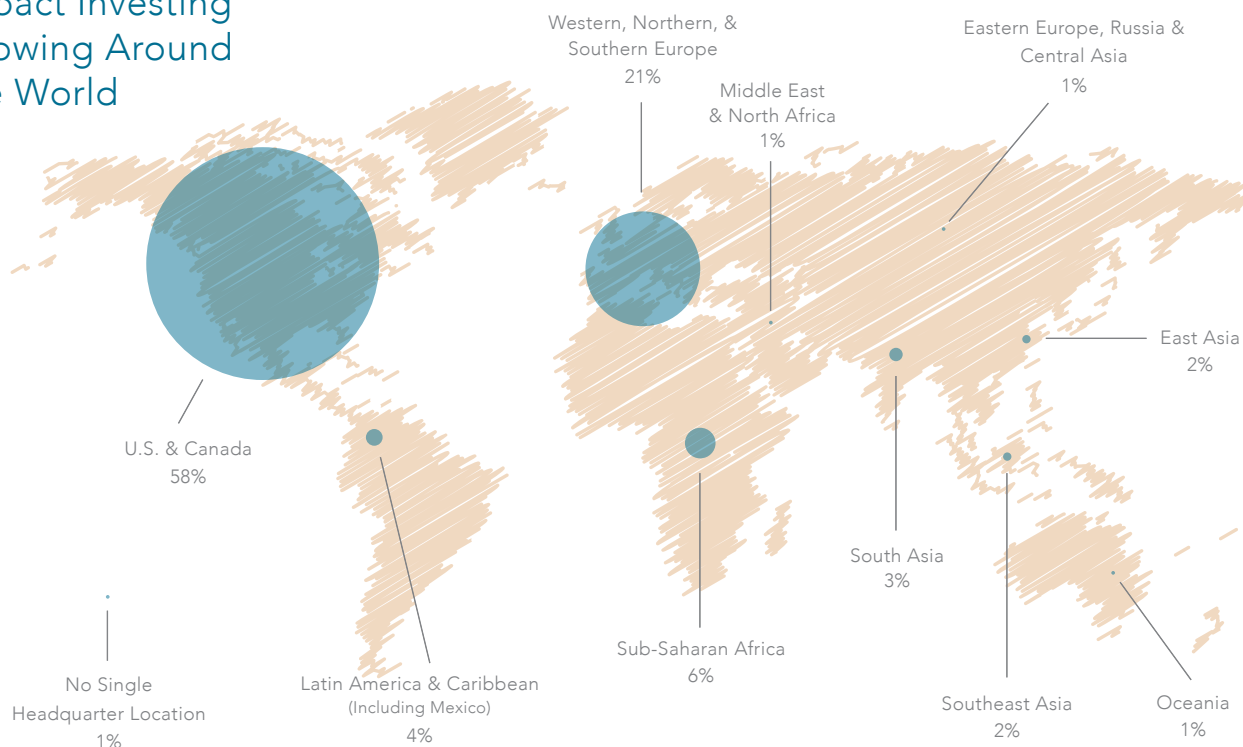
A Growing Demand: Enterprises that look further ahead and embrace social and environmental constraints and opportunities will, in the long run, outperform those that favor the status quo.

No matter how you define Impact Investing, there is wide agreement that certain global drivers are propelling it into the spotlight – population growth, competition for resources and climate change:

- Natural Resource Constraints
- Ecosystem Loss
- Waste Reduction
- Global Carbon Reduction
- Energy Demand
- Civic and Corporate Sustainability
- Social Injustices
- Financial and Educational Access Gaps

Impact Investing Growing Around the World

Source: GIIN



OUR STRATEGIC PARTNERSHIP:

Teaming Up with the Leading Private Impact Investment Firm



To meet the demand for private market investments, we form strategic partnerships with leading managers. One example is our partnership with Stepping Stone Partners, a leading private impact investment consulting firm. Stepping Stone's mission is to perform extensive due diligence and monitoring on private investments that target positive social and environmental outcomes while seeking competitive financial returns. We stand behind our combined belief that an increasingly connected and interdependent world will reward enterprises that focus on building an economy in balance with natural systems.

We have three impact themes, each of which are underpinned by UN Sustainable Development Goals (SDGs): Green Innovation, Economic Empowerment, and Conscious Commerce.



GREEN INNOVATION



Energy Efficiency



Green Building



Renewable Energy



Stewardship of
Natural Capital



Sustainable Mobility



ECONOMIC EMPOWERMENT



Gender Equality



Access to
Information



Responsible
Finance



CONSCIOUS COMMERCE



Food & Human
Health



Sharing
Economy





WE INVITE YOU TO START YOUR EXPERIENCE TODAY

Stop by and see us: 204 Spring Street, Marion, MA 02738 | **Email:** info@baldwinbrothersinc.com

Additional information, including management fees and expenses, is provided on our Form ADV Part 2, available upon request or at the SEC's public disclosure website, www.adviserinfo.sec.gov. Past performance is not a guarantee of future results.

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