



1151 Fairview Avenue N  
Seattle, WA 98109

tel/ 206.694.5575

fax/ 206.694.5581

## **FOR IMMEDIATE RELEASE**

**CONTACT:** Rachel F. Nelson  
Public Communications Inc. (PCI)  
813.226.2772  
[rmelson@pci-web.com](mailto:rmelson@pci-web.com)

### **PARAMETRIC PORTFOLIO ASSOCIATES ANNOUNCES AGREEMENT WITH KLD RESEARCH & ANALYTICS, INC.**

*Parametric partners with KLD to offer separate accounts utilizing KLD social screens and the Domini 400 Social<sup>SM</sup> Index benchmark*

**SEATTLE, Wash. --** (June 4, 2002) – Parametric Portfolio Associates, an investment firm specializing in individually managed equity portfolios, today announced it has entered into an agreement with KLD Research & Analytics, Inc., the leading provider of social investment research and benchmarks, to offer socially responsible separate accounts.

The agreement will, for the first time, provide investors with a separately managed investment option, targeting KLD's recognized standard for social investing, the Domini 400 Social<sup>SM</sup> Index (DS 400).

"We are very excited about this collaboration," said Brian Langstraat, managing director and chief executive officer of Parametric. "KLD has set the gold standard for social investing by developing the most recognized social benchmark in the country, the DS 400."

According to Langstraat, the partnership with KLD is a natural extension of Parametric's highly-customized, individually managed accounts. "In the past this type of social investing was only available in mutual funds or in institutional-size separate accounts" he said. "By combining the tax, risk and customization benefits of true separate accounts with socially responsible investing, we offer real advantages over mutual fund offerings and reach a wider investor base."

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Parametric will offer the new DS 400 separate accounts through select financial consultants and leading registered investment advisors (RIAs) at minimums of \$250,000 and above. In addition, Parametric will employ KLD social research to build other custom benchmark separate accounts to serve both the high net worth and foundation marketplace.

KLD launched the DS 400, modeled on the S&P 500® Index, in May of 1990 as the first benchmark for social investing. The Social Investment Forum, a national nonprofit organization supporting socially responsible investing, reports that one in every eight dollars of assets under management in the United States is invested under some form of social constraint.

The alliance with Parametric allows KLD to apply their well-known brand to the fast-growing separate account marketplace. “This growing community of investors can now integrate social criteria into their investment decisions in a more dynamic fashion,” said Peter D. Kinder, president of KLD. “By aligning with Parametric, we can help implement social investment programs in tax-efficient separate accounts and support high levels of customization for conscientious investors.”

### **About Parametric Portfolio Associates**

Parametric Portfolio Associates is a Seattle-based investment firm specializing in managing broadly diversified equity portfolios. Parametric’s portfolio offerings enable each investor to better control taxes, risk and investment objectives. Parametric is guided by the principle that investors should evaluate any investment performance in the context of risk and net of all taxes, fees, and costs. The firm manages approximately \$5 billion in assets for high net worth individuals, families, taxable and charitable institutions. More information about Parametric socially screened separate accounts or Parametric Portfolio Associates is available by calling Bob Breshock at 206-694-5575 or by visiting [www.parametricportfolio.com](http://www.parametricportfolio.com)

### **About KLD Research & Analytics, Inc.**

Headquartered in Boston, KLD Research & Analytics, Inc. promotes global socially responsible investing by providing superior corporate social research products and services to institutional investors. KLD supplies performance benchmarks, corporate accountability research and consulting services to leading investment institutions worldwide. More information about KLD is available by calling Anjali K. Gupta at 617-426-5270 or by visiting [www.kld.com](http://www.kld.com).

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