10 Things You Should Know About Proxy Voting

Most investors don't think much about proxy voting until a ballot arrives in the mail or their inbox. Here's why your voice matters.

1 **Ownership comes with a voice** – Proxy voting gives shareholders an opportunity to weigh in on certain important decisions rather than simply watching them unfold. While any one vote is just one among many, the collective results help determine what happens next—and that can have a real impact on the investments shareholders own.

2 **Some decisions need a green light** – Most day-to-day decisions are handled by a fund's management team and board, but certain proposals legally require shareholder approval before they can move forward. Proxy voting gives investors a say in significant decisions affecting the funds they own.

3 **The board has already done its homework** – Before a proposal reaches shareholders, it has first been reviewed and approved by the fund's board. The board plays an important role in evaluating fund changes and determining whether the proposal should be brought to shareholders for consideration.

4 **Wait, I get a vote?** – When a proposal goes to a vote, ballots are generally sent only to shareholders of the fund affected by the proposal. Investors who don't own shares of that fund are not eligible to vote on matters affecting it.

5 **It only takes a few minutes** – Despite the name, proxy voting doesn't require attending a shareholder meeting in person. Votes can typically be submitted online, by phone, or by mail before the meeting takes place, and casting a ballot often takes just a few minutes.

6 **Sooner rather than later** – There may be an added benefit to voting early: fewer reminders. Once a ballot is submitted, shareholders generally won't receive additional emails, phone calls, texts, or mailings encouraging them to participate.

7 **One ballot, multiple decisions** – A proxy vote isn't always limited to a single proposal. Depending on the circumstances, a single ballot may include several separate items for shareholders to consider, from trustee elections and advisory arrangements to potential changes in a fund's structure or policies.

8 **What's in the packet?** – Proxy materials explain what's being voted on, why the vote is taking place, and how to cast a ballot. The documents may seem lengthy, but they're intended to provide the information shareholders need to make informed decisions. Think of them as the guidebook for the vote ahead.

9 **Quorum is the magic word** – Every proxy vote has a minimum participation threshold known as a quorum to ensure important decisions aren't made based on feedback from only a small group of shareholders.

10 **Silence has a cost** – If a proxy vote falls short of a quorum, funds may need to extend voting periods and devote additional time and resources to gathering more ballots.

To learn more about proxy voting and how it can affect your investments, talk to your financial professional.

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