



**Office of the Minnesota Secretary of State**  
**Minnesota Public Benefit Corporation / Annual Benefit Report**  
*Minnesota Statutes, Chapter 304A*



Read the instructions before completing this form  
 Must be filed by March 31  
 Filing Fee: \$55 for expedited service in-person, \$35 if submitted by mail

The Annual Benefit Report covers the 12 month period ending on December 31 of the previous year.  
 Notice: Failure to file this form by March 31 of this year will result in the revocation of the corporation's public benefit status without further notice from the Secretary of State, pursuant to Minnesota Statutes, Section 304A.301

- File Number 1257644300030
- Corporate Name: (Required) Centered Wealth GBC
- The public benefit corporation's board of directors has reviewed and approved this report.
- In the field below, enter the information required by section 304A.301 subd. 2 or 3 for the period covered by this report, (see instructions for further information): Note: Use additional sheets if needed. (Required)

See Attached

5. I, the undersigned, certify that I am the chief executive officer of this public benefit corporation. I further certify that I have signed this document no more than 30 days before the document is delivered to the secretary of state for filing, and that this document is current when signed. I further certify that I have completed all required fields, and that the information in this document is true and correct and in compliance with the applicable chapter of Minnesota Statutes. I understand that by signing this document I am subject to the penalties of perjury as set forth in Section 609.42 as if I had signed this document under oath.

Signature of Public Benefit Corporation's Chief Executive Officer

3/15/23

Date (Must be dated within 30 days before the report is delivered to the Secretary of State for Filing)

**Email Address for Official Notices**

Enter an email address to which the Secretary of State can forward official notices required by law and other notices:

jina@centered-wealth.com

Check here to have your email address excluded from requests for bulk data, to the extent allowed by Minnesota law.

**List a name and daytime phone number of a person who can be contacted about this form:**

Anya Gage 612-453-1322  
 Contact Name Phone Number

**Entities that own, lease, or have any financial interest in agricultural land or land capable of being farmed must register with the MN Dept. of Agriculture's Corporate Farm Program.**

Does this entity own, lease, or have any financial interest in agricultural land or land capable of being farmed?  
 Yes  No

## Centered Wealth GBC 2022 Benefit Report

Centered Wealth GBC is co-owned by Jina Penn-Tracy and Stuart Valentine. Jina Penn-Tracy serves as President and Stuart Valentine serves as Vice-president.

We have chosen the B-Corp Impact Assessment as the tool by which we will measure our annual impact progress. <https://bimpactassessment.net/>

We have approved the attached Assessment Report.

The report covers the time frame of January 1<sup>st</sup>, 2022, to December 31<sup>st</sup>, 2022.

Centered Wealth GBC is an investment advisory practice which focuses on sustainable, responsible and impact investing. The goal of this type of investing is to create measurable positive progress on the part of companies and municipalities where our clients invest. We also encourage high levels of giving with our clients and using their resources towards creating a better future.

We routinely evaluate the impact of our investments using third-party assessment tools and we actively engage in increasing ESG accountability in public corporations and public investment funds (such as state pensions).

We also seek to run our business in a sustainable and socially conscious manner. We seek to hire and train under-represented populations in the financial industry. We run our operations on wind-sourced energy where possible, ethically sourced materials and engage in recycling efforts as much as possible.

The B-Corp Assessment was chosen because it specifically has an assessment track for investment firms which we felt was the most applicable to our company.

This is the stated purpose of our GBC:

**PURPOSE AND INTENT**

2.1 *Purposes of Corporation* - The purposes of the Corporation are:

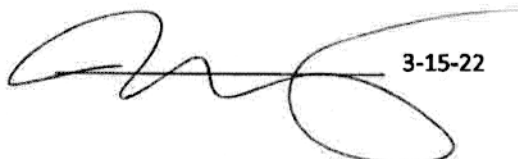
2.1.1 to make a positive impact in the world through the platform of finance .

We believe this report shows that we are fulfilling on this purpose.

Thank you-

Jina Penn-Tracy

Stuart Valentine



3-15-22



3-15-22

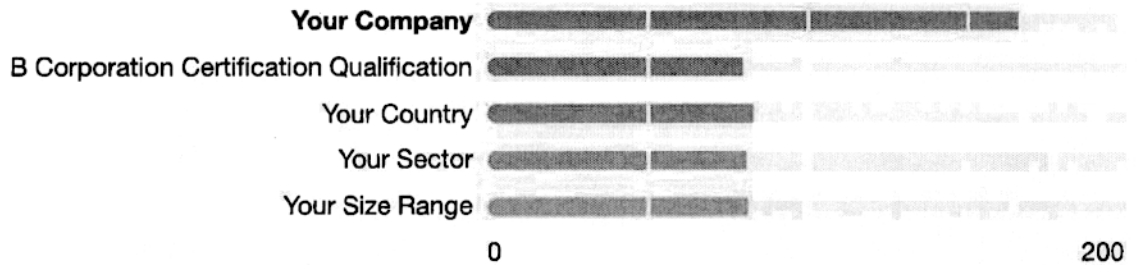
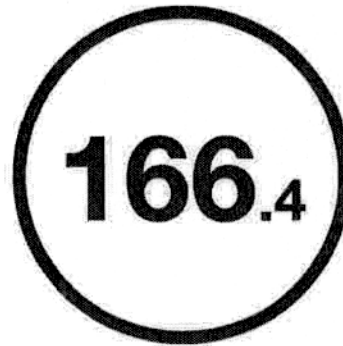


Overall B Impact Score



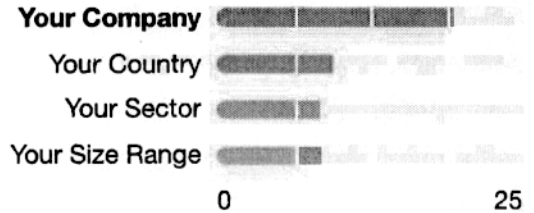
# Centered Wealth GBC

For Fiscal Year End Date: 31 Dec 2022



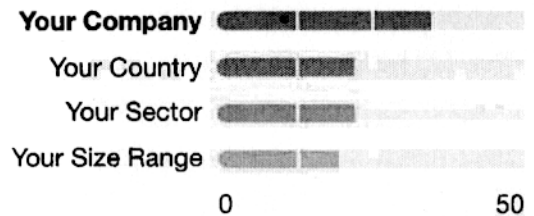
## Governance

QUESTIONS ANSWERED 21/21  
OVERALL SCORE 19.3



## Workers

QUESTIONS ANSWERED 40/40  
OVERALL SCORE 34.8



**Community**

QUESTIONS ANSWERED OVERALL SCORE

42/43

42.2

Your Company 

Your Country 

Your Sector 

Your Size Range 

0

80

**Environment**

QUESTIONS ANSWERED OVERALL SCORE

27/27

9.0

Your Company 

Your Country 

Your Sector 

Your Size Range 

0

20

**Customers**

QUESTIONS ANSWERED OVERALL SCORE

26/26

60.9

Your Company 

Your Country 

Your Sector 

Your Size Range 

0

65



**Work Item 1382149600037**  
**Original File Number 1257644300030**

STATE OF MINNESOTA  
OFFICE OF THE SECRETARY OF STATE  
FILED  
**03/23/2023 11:59 PM**

*Steve Simon*

Steve Simon  
Secretary of State