



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

1. File Number

2. Corporate Name: (Required)

3. The public benefit corporation's board of directors has reviewed and approved this report.

4. 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)

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 609.48 as if I had signed this document under oath.

Signature of Public Benefit Corporation's Chief Executive Officer

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:

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:

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 2023 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 1st, 2023, to December 31st, 2023.

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). Additionally, our cofounder, Stuart Valentine teaches sustainable investment principals in a local University.

We also seek to run our business in a sustainable and socially conscious manner. We run our operations on wind-sourced energy, ethically sourced materials and engage in recycling efforts as much as possible. The only hinderance to such activities have been in our leased properties. We are working with our landlords to increase building sustainability practices.

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:
2.2
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.

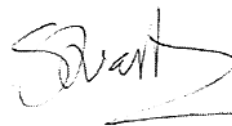
Thank you-

Jina Penn-Tracy



3-27-24

Stuart Valentine



3-27-24

Help shape the future of B Corp Certification. Share your feedback on the latest draft standards.



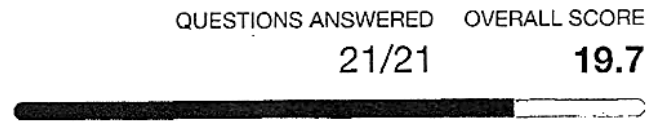
Overall B Impact Score (i)

Centered Wealth GBC

For Fiscal Year End Date: 31 Dec 2023



Governance



Mission & Engagement SCORE
5.7/6



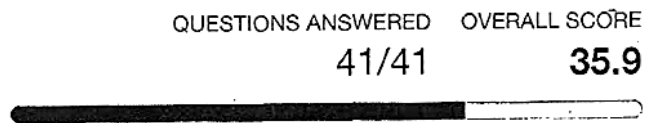
Ethics & Transparency SCORE
4.0/9



Mission Locked SCORE
- Impact Business Model 10.0/10



Workers



SCORE

SCORE

Financial Security 13.6/20



Health, Wellness, & Safety 8.9/12



SCORE

Career Development 4.2/6



Career Development SCORE

(Salaried) 1.7/2



SCORE

Engagement & Satisfaction 3.5/6.5



Engagement & Satisfaction SCORE

(Salaried) 2.1/3.5



Community

QUESTIONS ANSWERED OVERALL SCORE

42/43

39.3



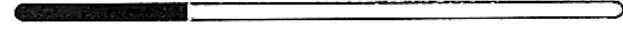
SCORE

Diversity, Equity, & Inclusion 7.4/15



SCORE

Economic Impact 4.2/15



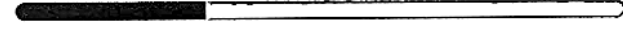
SCORE

Civic Engagement & Giving 7.9/12



SCORE

Supply Chain Management 2.5/8



Designed to Give SCORE

- Impact Business Model 14.2/30

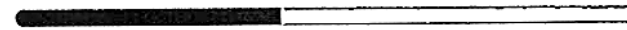


Environment

QUESTIONS ANSWERED OVERALL SCORE

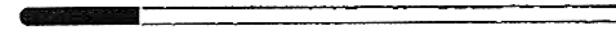
27/27

8.4



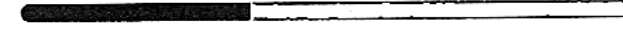
SCORE

Environmental Management 1.4/7



SCORE

Air & Climate 2.6/7



SCORE

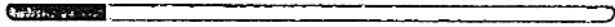
Water 0.3/2



SCORE

Land & Life 2.7/4



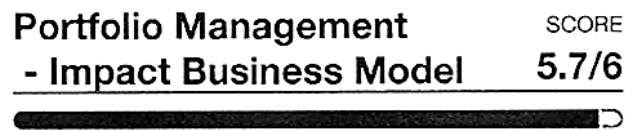
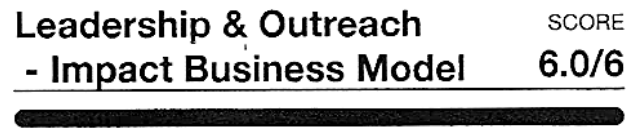
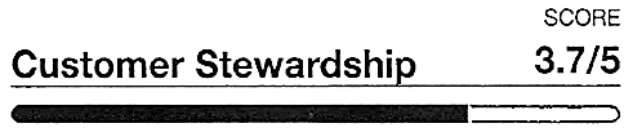


Customers

QUESTIONS ANSWERED OVERALL SCORE

26/26

60.9





Work Item 1465614500030
Original File Number 1257644300030

STATE OF MINNESOTA
OFFICE OF THE SECRETARY OF STATE
FILED
03/27/2024 11:59 PM

Steve Simon

Steve Simon
Secretary of State