

Key Performance Indicators

GOVERNANCE, ETHICS, COMPLIANCE AND SHAREHOLDERS

	2007 RESULTS	2008 GOALS
Board Governance	Created CSR Committee	CSR Committee reviews performance three times in 2008
Community Reinvestment Act (CRA) Ratings	All banks rated Outstanding	Continue our CRA strategy approach in our reorganized institutions to maintain ability to achieve Satisfactory or better ratings
Shareholder Reporting Transparency	Provided greater business unit financial detail	Publish first CSR Report

CLIENTS AND PRODUCTS

	2007 RESULTS	2008 GOALS
Client Satisfaction	Defined five client satisfaction standard metrics to track and incorporate into surveys	Achieve 80%+ positive ratings on all client satisfaction standard metrics
Socially Responsible Product Volume	\$600M in socially screened investments Voluntary Carbon Unit registry accepted clients	Launch two socially responsible products and grow existing offerings

EMPLOYEES

	2007 RESULTS	2008 GOALS
Performance Management Program	Design program for global implementation	Global rollout of Performance Management Program
Employee Engagement	Develop baseline measures across the organization	Engagement survey response plans developed
Affinity Networks	Design of global governance structure	Implementation of governance structure

ENVIRONMENTAL SUSTAINABILITY

	2007 RESULTS	2008 GOALS
Environmental Management System	Develop Environmental Statement and Commitments	Adopt Environmental Statement and Commitments Develop management plan (energy and paper usage, emissions, waste)
Suppliers Engaged		Begin requesting CSR information from suppliers

COMMUNITY

	2007 RESULTS	2008 GOALS
Impact of Philanthropy	\$60M added to Foundations	Select and launch two major impact programs
Level of Employee Engagement in Community Partnership Program	46% of employees giving \$6M 8% of employees volunteer through corporate programs	48% of employees giving \$7M 10% of employees volunteer through corporate programs
Supplier Diversity	Approximately 10% total spend on priority vendors	12% total spend on priority vendors