



Boston Trust Investment  
Management, Inc.

**SEC File Number 801-60136**

March 31, 2014

# Brochure Supplements (Form ADV, Part 2B)

Of  
Boston Trust Investment Management, Inc. ("**BTIM**")  
One Beacon Street  
Boston, MA 02108  
800-282-8782 ext. 7050  
[www.btim.com](http://www.btim.com)

The following brochure supplements provide information about BTIM's advisory personnel as required by Rule 204-3 of the United States Securities and Exchange Commission ("**SEC**").

The information contained in the brochure supplements is current as of the above date and is subject to change at BTIM's discretion.

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## **1.1 Brochure Supplement for Amyouny, Stephen J.**

### **1.1.1 Cover Page**

Name: Stephen J. Amyouny

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7285

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Stephen J. Amyouny and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.1.2 Educational Background and Business Experience**

Stephen J. Amyouny (born 1966) manages the Boston Trust Midcap Fund (BTMFX) and Walden Midcap Fund (WAMFX). Mr. Amyouny serves on the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1996, Mr. Amyouny served as a trust officer in BayBank's personal trust division. He holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned a B.A. in economics from Tufts University and an M.B.A. from Boston University.

### **1.1.3 Disciplinary Information**

There is no disciplinary history for Stephen J. Amyouny.

### **1.1.4 Other Business Activities**

Stephen J. Amyouny is the director of equity research and a portfolio manager. He manages balanced and equity portfolios and is the lead manager of the Boston Trust and Walden Mid Cap and Growth Equity strategies. He is co-chair of the Investment Committee and a member of the Portfolio Strategy Committee.

### **1.1.5 Additional Compensation**

Stephen J. Amyouny does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Amyouny is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.1.6 Supervision**

Stephen J. Amyouny is supervised by William H. Apfel, Chief Investment Officer of Boston Trust (telephone 617-726-7280), and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

## **1.2 Brochure Supplement for Apfel, William H.**

### **1.2.1 Cover Page**

Name: William H. Apfel

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7280

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about William H. Apfel and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.2.2 Educational Background and Business Experience**

William H. Apfel (born 1952) manages the Walden Equity Fund (WSEFX) and Walden Asset Management Fund (WSBFX). Mr. Apfel serves on the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1989, Mr. Apfel was an investment executive at Kidder, Peabody & Co. He holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned a B.A. from Binghamton University, an M.A. from Georgetown University, and a Ph.D. from Brown University.

### **1.2.3 Disciplinary Information**

There is no disciplinary history for William H. Apfel.

### **1.2.4 Other Business Activities**

William H. Apfel is the chief investment officer and a portfolio manager. He manages balanced and equity portfolios and is the lead manager of the Boston Trust and Walden core equity and balanced strategies. He is chair of the Portfolio Strategy Committee and co-chair of the Investment Committee. He also serves as managing director of Walden Asset Management, a division of Boston Trust.

### **1.2.5 Additional Compensation**

William H. Apfel does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Apfel is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.2.6 Supervision**

William H. Apfel is supervised by Domenic Colasacco, President of Boston Trust (telephone 617-726-7252), and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

## **1.3 Brochure Supplement for Colasacco, Domenic**

### **1.3.1 Cover Page**

Name: Domenic Colasacco

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7252

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Domenic Colasacco and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.3.2 Educational Background and Business Experience**

Domenic Colasacco (born 1948) manages the Boston Trust Asset Management Fund (BTBFX) and Boston Trust Equity Fund (BTEFX). Mr. Colasacco is chairman of the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1974, Mr. Colasacco was a senior portfolio manager at Merrill Lynch Asset Management. He holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned B.S. and M.B.A. degrees from Babson College.

### **1.3.3 Disciplinary Information**

There is no disciplinary history for Domenic Colasacco.

### **1.3.4 Other Business Activities**

Domenic Colasacco is the president of Boston Trust and a portfolio manager. He manages balanced and equity portfolios. He is a member of the Investment and Portfolio Strategy Committees.

### **1.3.5 Additional Compensation**

Domenic Colasacco does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Colasacco is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.3.6 Supervision**

Domenic Colasacco is supervised by the Board of Directors of Boston Trust, and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

## **1.4 Brochure Supplement for Cushing, Mark E.**

### **1.4.1 Cover Page**

Name: Mark E. Cushing

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7362

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Mark E. Cushing and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.4.2 Educational Background and Business Experience**

Mark E. Cushing (born 1956) is a senior relationship manager and serves on the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1998, Mr. Cushing worked at SEI Corporation in its investments services and systems group. He also worked for twelve years in a variety of roles at IBM Corporation. He holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned a B.A. degree, magna cum laude and Phi Beta Kappa, from Colgate University and an M.T.S. degree in theology from Harvard University.

### **1.4.3 Disciplinary Information**

There is no disciplinary history for Mark E. Cushing.

### **1.4.4 Other Business Activities**

Mark E. Cushing manages balanced and equity portfolios. He is a member of the Investment Committee and contributes to securities research for equity portfolio strategies. He also leads the Firm's<sup>2</sup> new business development and client relationship efforts.

### **1.4.5 Additional Compensation**

Mark E. Cushing does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Cushing is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.4.6 Supervision**

Mark E. Cushing is supervised by Domenic Colasacco, President of Boston Trust (telephone 617-726-7252).

## **1.5 Brochure Supplement for Franco, Stephen C.**

### **1.5.1 Cover Page**

Name: Stephen C. Franco

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7137

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Stephen C. Franco and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.5.2 Educational Background and Business Experience**

Stephen C. Franco (born 1971) manages the Boston Trust SMID Cap Fund (BTSMX) and Walden SMID Cap Innovations Fund (WASMX), as well as separate account portfolios for institutional clients of the Adviser<sup>3</sup>. Prior to joining Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company, in 2005, Mr. Franco worked as a senior research analyst at U.S. Bancorp Piper Jaffray, in which capacity he conducted equity research for institutional clients. He has also served as a consultant in the financial services and technology industries. Mr. Franco holds the Chartered Financial Analyst®<sup>1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned B.A. and M.B.A. degrees from Boston University and an M.S. in finance from Boston College.

### **1.5.3 Disciplinary Information**

There is no disciplinary history for Stephen C. Franco.

### **1.5.4 Other Business Activities**

Mr. Franco is a portfolio manager, lead manager of the Boston Trust SMID Cap strategy, and a member of the Boston Trust Small and Mid Cap portfolio management teams. He is a member of the Investment Committee and contributes to research in the information technology, telecom, and financial services sectors.

### **1.5.5 Additional Compensation**

Stephen C. Franco does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Franco is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.5.6 Supervision**

Stephen C. Franco is supervised by William H. Apfel, Chief Investment Officer of Boston Trust (telephone 617-726-7280), and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

## **1.6 Brochure Supplement for Gentry, Russell T.**

### **1.6.1 Cover Page**

Name: Russell T. Gentry

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7266

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Russell T. Gentry and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.6.2 Educational Background and Business Experience**

Russell T. Gentry (born 1979) is a member of the Boston Trust Small and SMID Cap portfolio management team, which manages separate account portfolios for institutional clients of the Adviser<sup>3</sup>. Mr. Gentry joined Boston Trust & Investment Management Company, BTIM's parent company ("Boston Trust"), in 2002 and previously served as an assistant trader and as a quantitative analyst, with a focus on portfolio attribution, equity factor analysis, and asset allocation. Mr. Gentry holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned a B.S. in finance, cum laude, from Northeastern University.

### **1.6.3 Disciplinary Information**

There is no disciplinary history for Russell T. Gentry.

### **1.6.4 Other Business Activities**

Mr. Gentry is a portfolio manager and member of the Boston Trust Small and SMID Cap portfolio management team. He is a member of the Investment Committee and contributes to research in the materials and industrials sectors, as well as supporting the development and implementation of various quantitative research tools.

### **1.6.5 Additional Compensation**

Russell T. Gentry does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Gentry is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.6.6 Supervision**

Russell T. Gentry is supervised by William H. Apfel, Chief Investment Officer of Boston Trust (telephone 617-726-7280).



## **1.7 Brochure Supplement for Santini, Lucia B.**

### **1.7.1 Cover Page**

Name: Lucia B. Santini

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7254

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Lucia B. Santini and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.7.2 Educational Background and Business Experience**

Lucia B. Santini (born 1958) is the managing director of BTIM and serves as the senior relationship manager for fund-related accounts. Ms. Santini serves on the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1982, Ms. Santini worked for NEACH at the Federal Reserve Bank of Boston. She holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. She earned a B.A., cum laude, from Connecticut College and an M.B.A. from Boston University. She currently serves on the board of UUSC, a human rights organization with a Unitarian Universalist heritage, and on the board of the Church of the Larger Fellowship (UU) and the Liberal Religious Charitable Society.

### **1.7.3 Disciplinary Information**

There is no disciplinary history for Lucia B. Santini.

### **1.7.4 Other Business Activities**

Ms. Santini is a portfolio manager and manages balanced and core equity portfolios. She has occupied a variety of senior management roles at the Firm<sup>2</sup>, including chief operating officer, in which capacity she oversaw administration, operations, finance, and compliance. Ms. Santini is a member of the Investment Committee.

### **1.7.5 Additional Compensation**

Lucia B. Santini does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Ms. Santini is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.7.6 Supervision**

Lucia B. Santini is supervised by Domenic Colasacco, President of Boston Trust (telephone 617-726-7252).

## **1.8 Brochure Supplement for Scott, Kenneth P.**

### **1.8.1 Cover Page**

Name: Kenneth P. Scott

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7003

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Kenneth P. Scott and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.8.2 Educational Background and Business Experience**

Kenneth P. Scott (born 1967) manages the Boston Trust Small Cap Fund (BOSOX), Walden Small Cap Innovations Fund (WASOX), Boston Trust SMID Cap Fund (BTSMX), Walden SMID Cap Innovations Fund (WASMX), and separate account portfolios for institutional clients of the Adviser<sup>4</sup>. Mr. Scott serves on the Board of Directors of Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company. Prior to joining Boston Trust in 1999, Mr. Scott was an analyst at Calvert Group and served for three years at the Council on Economic Priorities, where he co-authored company-specific environmental reports. He holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. He earned a B.A., cum laude, and an M.S. in finance from Boston College.

### **1.8.3 Disciplinary Information**

There is no disciplinary history for Kenneth P. Scott.

### **1.8.4 Other Business Activities**

Kenneth P. Scott is the director of small cap investing and a portfolio manager. He is a member of the Investment and Portfolio Strategy Committees, and contributes to research in the energy sector.

### **1.8.5 Additional Compensation**

Kenneth P. Scott does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Mr. Scott is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.8.6 Supervision**

Kenneth P. Scott is supervised by Domenic Colasacco, President of Boston Trust (telephone 617-726-7252), and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

## **1.9 Brochure Supplement for Vanni, Heidi H.**

### **1.9.1 Cover Page**

Name: Heidi H. Vanni

Business Address: One Beacon Street, Boston, MA 02108

Telephone Number: 617-726-7136

Firm Name: Boston Trust Investment Management, Inc.

Date: March 31, 2013

**This brochure supplement provides information about Heidi H. Vanni and supplements BTIM's brochure (Form ADV, Part 2A). You should have received a copy of that brochure. Please contact BTIM at 800-282-8782 ext. 7050 if you did not receive BTIM's brochure or if you have any questions about the contents of this supplement.**

### **1.9.2 Educational Background and Business Experience**

Heidi H. Vanni (born 1978) manages the Boston Trust SMID Cap Fund (BTSMX) and Walden SMID Cap Innovations Fund (WASMX), as well as separate account portfolios for institutional clients of the Adviser<sup>4</sup>. Prior to joining Boston Trust & Investment Management Company ("Boston Trust"), BTIM's parent company, in 2001, Ms. Vanni worked at MFS Investment Management Company. She holds the Chartered Financial Analyst<sup>®1</sup> designation and is a member of the Boston Security Analysts Society and the CFA Institute. She earned a B.S., cum laude, from Boston University and an M.B.A. with honors from Boston College.

### **1.9.3 Disciplinary Information**

There is no disciplinary history for Heidi H. Vanni.

### **1.9.4 Other Business Activities**

Heidi H. Vanni is portfolio manager and member of the Boston Trust Small and SMID Cap portfolio management team. She is a member of the Investment Committee and contributes to research in the health care and consumer sectors.

### **1.9.5 Additional Compensation**

Heidi H. Vanni does not receive any economic benefit, other than a regular salary and a bonus, for providing investment advisory services to clients. Bonuses are paid annually to employees at the discretion of the Board of Directors of Boston Trust. The bonus varies and is primarily based on the overall performance of the Firm<sup>2</sup> as well as the employee's contribution to the Firm<sup>2</sup>. Ms. Vanni is a stockholder of the Adviser's<sup>3</sup> affiliate and holding company, BTIM Corp., and as such, receives distributions from BTIM Corp. in addition to cash compensation from Boston Trust.

### **1.9.6 Supervision**

Heidi H. Vanni is supervised by William H. Apfel, Chief Investment Officer of Boston Trust (telephone 617-726-7280), and his investment advice to the BTIM Funds<sup>4</sup> is monitored through a standard set of controls implemented by the Boston Trust Board of Directors and the Adviser's<sup>3</sup> Chief Compliance Officer.

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<sup>1</sup> The Chartered Financial Analyst (“CFA”) designation is issued by the CFA Institute. CFA candidates must meet one of the following requirements: (1) undergraduate degree and four years of professional experience involving investment decision-making, or (2) four years qualified work experience (full time, but not necessarily investment-related). To receive the CFA designation, candidates must complete the CFA Program which is organized into three levels, each requiring 250 hours of self-study and each culminating in a six-hour exam. The disciplines of study include accounting, economics, ethics, equity analysis, fixed income analysis, portfolio management and statistics. The CFA candidate is also required to understand and sign a professional code of conduct statement which commits the individual to the CFA Institute’s Code of Ethics and Standards of Professional Conduct. There are no ongoing continuing education or experience thresholds necessary to maintain the CFA designation. More information about the CFA is available at [www.cfainstitute.org](http://www.cfainstitute.org)

<sup>2</sup> References herein to the “Firm” refer to Boston Trust & Investment Management Company and Boston Trust Investment Management, Inc. collectively.

<sup>3</sup> References herein to the “Adviser” refer to Boston Trust Investment Management, Inc.

<sup>4</sup> References herein to the “Funds” refer to the registered investment companies collectively advised by Boston Trust Investment Management, Inc.