

For Immediate Release

Socially Responsible Investing: Investment Management Firm Jantz Morgan

Engages IBM To Help Assess, Develop Corporate Social Responsibility Strategy

ARMONK, NY -- 10 October 2008: IBM (NYSE: IBM) is providing consulting services to help Boston-area financial investment firm Jantz Morgan LLC integrate corporate social responsibility throughout its business strategy and operations.

Through this engagement signed in 3Q, the objective of this initiative by Jantz Morgan is to ensure that CSR informs all aspects of its business and reflects the values of the company's founders. That includes issues such as transparency and engagement with investors, how the company treats its employees, its impact on the environment, and how it participates in the community.

"Many of our customers are telling us they want more than just a good return on their money – they want to know their social values are reflected in the investments they make," said Sean Morgan, president of Jantz Morgan. "It is also important to them that our company is socially responsible, that our personal values are reflected in our company – they want social responsibility to be personal, not just a business decision."

Beyond the company's interest in being a responsible corporate citizen, Jantz Morgan believes that socially responsible investments can be rewarding as well. Testing by the firm of socially responsible investment portfolios has shown promising performance. Jantz Morgan has been managing SRI portfolios for institutions and plans to roll out its first SRI portfolio to individual clients this fall.

Through this engagement, IBM is helping Jantz Morgan as it

- Incorporates CSR principles into its business strategy;
- Identifies key stakeholders and how to engage them;
- Evaluates its values and engages its employees;
- Defines the tools and insights required to develop a strategic set of CSR initiatives;
- Reviews industry best practices;
- And develops a roadmap to reach its strategic CSR objectives.

"Jantz Morgan is among a growing list of leadership enterprises that understand how socially responsible business practices, corporate reputations, and growth potential are becoming one and the same," said Eric Riddleberger, global leader for IBM's business strategy consulting practice. "By developing a CSR foundation for their business strategies, companies have an opportunity not only to protect themselves, but actually grow their businesses, by retaining customers and attracting new ones through their integrity and their authentic contributions to society."

Business leaders acknowledge the advantages that come from proactively addressing corporate social responsibility issues. An IBM global CSR survey of more than 250 c-

suite executives showed that 68 percent of them already are focusing on CSR activities to create new revenue streams and 54 percent believe CSR gives them a competitive advantage. Additionally IBM's biennial global survey of more than 1,100 CEOs showed that the majority of them plan to increase their investments in CSR by 25 percent over the next three years.

In addition, independent research verifies that CSR is important to consumers. According to UK consumer research firm Fraser Consultancy, a quarter of all consumers say they would switch brands for a given product or service if provided with a more ethical alternative. Alloy Media and Marketing reports that 37 percent of people age 18 to 30 prefer to use brands that are socially conscious, with more than three-quarters of that group citing fair labor practices and two-thirds listing environmental factors as chief concerns.

To assist clients in incorporating CSR into their business strategies, IBM Global Business services has developed a set of consulting offerings, including its CSR Assessment and Benchmarking Utility, the Carbon Tradeoff Modeler, IBM Green Sigma™, and Environmental Product Lifecycle Management.

Jantz Morgan LLC is a boutique investment management company founded on the premise that superior quantitative models will significantly outperform human experts over the long term. The firm's proprietary methods combine System Dynamics and other quantitative disciplines with sound financial principles to create improved investment opportunities. The firm's objective is to provide its clients with total return at an acceptable level of asset volatility in a diversified portfolio. The firm aspires to do all this while being a socially responsible enterprise that is respectful of its clients' values. For more information, go to: <http://www.jantzmorgan.com/>

For more information about IBM's global survey on CSR, go to:
www.ibm.com/gbs/csrstudy

To learn more about IBM's strategy and change offerings, visit: http://www-935.ibm.com/services/us/gbs/bus/html/bcs_strategyplanning.html?re=gbs_fe_leftnav

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