

A person in a dark jacket and pants stands on a rocky, snow-dusted mountain peak. The entire image is overlaid with a semi-transparent red filter. The person is positioned in the center, looking down at something in their hands.

# FINDING AND CREATING OPPORTUNITIES FOR IMPACT INNOVATION

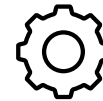
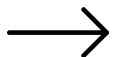
Creative Investment  
Research

Impact Investing Practice and Services

# What happens now?

Many point to impact investing as a global movement. Investors are no longer shying away from global challenges, even if those challenges appear to be social. It turns out the business of business is *us*, in all of our social complexity. How do we help?

We create new tools, models and ways of thinking to help investors maximize social and financial returns.



IMPACT INVESTMENT CREATION

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DATA ANALYSIS

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MODELING AND SIMULATION

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IMPLEMENTATION



New  
solutions,  
old  
problems.

We use new approaches to solve old investing challenges. These now concern social problems. New technology is only part of the solution. Without new ideas, tech tools will not only fail to live up to their potential, but they may give rise to entirely new problems. We research and invent new investment based solutions to entrenched social issues.

Our core impact investing services are:

1. Impact Investing Strategy
2. Impact Investing Initiatives
3. Impact Investing Research
4. Impact Investment Design
5. Impact Investing Measurement
6. Impact Investing Reporting



# Impact Investing Initiatives

We create impact investing vehicles, programs, projects applications and prototypes that maximize financial and social return. We work with stakeholders and clients to co-design investment initiatives and the strategy that drives them. We conduct market, public policy and regulatory analysis. We measure impact performance.

*What we've learned:* Impact investing is never a “straight-line” process. It is neither quick nor easy. It requires time, agility and flexibility.

Our core Impact Investing activities include:

- Creating [targeted fixed income vehicles](#)
- Creating [targeted equity vehicles](#)
- Creating [web, mobile and other digital applications](#)
- Creating [stakeholder engagement opportunities](#)
- Creating [public policy engagement opportunities](#)

We have worked with:

- [The Interfaith Center on Corporate Responsibility](#)
- [Pacific Gas and Electric](#)
- Pax World Funds
- [United Methodist Church Pension Fund](#)
- ... and many others

# Impact Investing Facilitation

We help introduce new ideas and have worked to set standards. We are objective and independent advisors and impact investment creators. We adopt innovation to organizations and markets. Clients obtain up-to-date knowledge and models of impact investing innovation. We provoke discussion and debate, finishing with modelling to help determine projected outcomes.

*What we've learned:* Since most of the investments we create are entirely new, we also work as facilitators and educators.

Our core facilitation and coaching activities include:

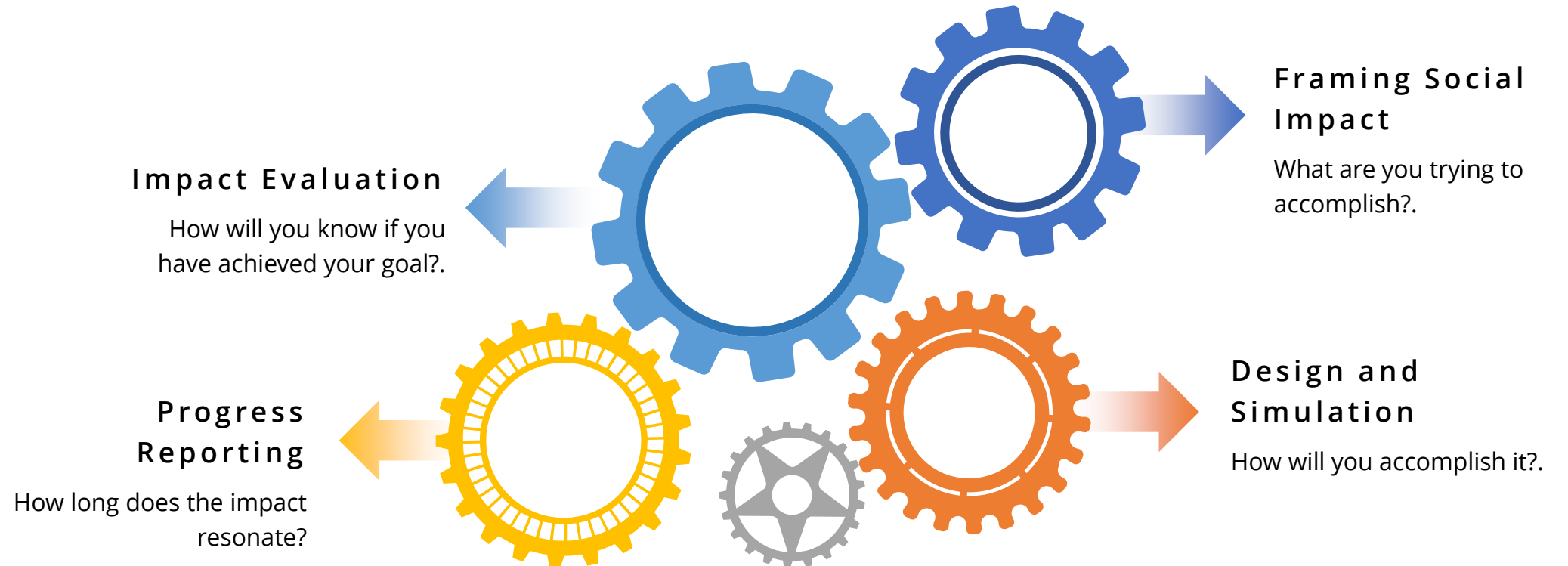
- Impact Investing Economic Forecast
- State and Federal Policy Analysis and Review
- International Financial Institution Policy Analysis
- Financial Instrument Impact Analysis
- Online Classes ([Udemy](#))
- Creating educational materials including [books](#)
- Online database and [resource](#) creation

We have facilitated educational efforts with:

- [UN Principles for Responsible Investment](#) & SDI
- Global Reporting Initiative
- [National Basketball Association](#)
- [Texas Association of Black Chambers of Commerce](#)
- [Social Investment Forum](#)
- [Harvard University](#)
- ...and many others

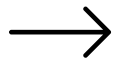


# Impact Measurement and Reporting



# Learning from the Best

Our journey has been an exploration of new ways to do things *better*, not for ourselves but for society. This, in turn, has led us to learn from those who are, simply, the best at what they do.



Clockwise, from top, Founder with Dr. Shaquille O'Neil at Georgetown University, Oprah Winfrey receiving a copy of [The Jobs Act: Crowdfunding for Small Businesses and Startups](#), With Former Federal Reserve Board Chair Janet Yellen, Fall, 2017 IMF Annual Meetings. Thesis Advisor and Nobel Prize winner Mr. Gary Becker.

*Together, we can create investments that improve society*

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