

Blueprint for Impact Investing

A special opportunity for foundations to explore the nuts and bolts of investing for mission impact.



Photo credit: Photo by Alden Skeie, Unsplash

*Philanthropy Northwest Annual Conference
October 3, 2018*

Presenters

Meyer Memorial Trust
Sayer Jones, Theresa Deibele
Caprock Group
Matthew Weatherly-White
Nick Flores
Russell Family Foundation
Kathleen Simpson
Tiedemann Advisors
Brad Harrison
Figure 8 Investment Strategies
Lisa Cooper
Edwards Mother Earth Foundation
Sutter Wehmeir
Foundation Source
Elizabeth Wong
Davis Wright Tremaine, LLP
Laverne Woods
LEAP Charities
Bart Cochran
Philanthropy Northwest
Rosalie Sheehy Cates

Bring Your Team to Boise

Create your own impact investing blueprint in this full-day session that emphasizes the real-world aspects in philanthropy.

Our presenters will cover the tasks and decisions faced by boards, program staff and endowment managers. You'll hear complete implementation stories from foundations that are already investing. Discuss your own issues and experiences. Gain impact investing insights from experienced financial advisors, attorneys and community investors.

We will also weave in strategies to activate all critical foundation assets such as social capital and purchasing power.

You'll leave with a customized blueprint for your own steps to launch impact investing at your organization.

***Take advantage of this
fast-paced and interactive event!***

Free to conference attendees and priced specially for one-day attendees or team add-ons. Email Elyse Gordon at egordon@philanthropynw.org for questions.

Register on Eventbrite at bit.ly/PNW18register.

Key questions your team can address at *Blueprint for Impact Investing*

INTENTION

What are our financial and mission intentions for investing?

POLICY & GOVERNANCE

What are the standards for investing?

Do we need new or revised policies?

Who considers and approves fund managers or investments?

Who monitors financial and mission results?

BUILDING THE PORTFOLIO

How much money are we placing in impact investment?

Which parts of our asset allocation are targeted?

What is the chronology for building the portfolio?

ACTIVATING ALL FOUNDATION CAPITAL

How do we deploy all our types of capital - Human, Social, Financial and Grant – to intentionally move our mission forward?

CAPACITY

Will we use existing or new staff members?

Will we need a new financial advisor?

Can the existing financial advisor work collaboratively with an impact advisor?