

# Impact Investing Resources For Advisors

ImpactAssets offers a wealth of knowledge resources for those new to the field and for experienced practitioners.



**IF WE CAN ASK GOOD QUESTIONS OF PEOPLE AND GET THEM TO THINK ABOUT THINGS, OR BRING THINGS TO THE TABLE THAT THEY MAYBE HAVEN'T THOUGHT OF BEFORE SO THEY CONSIDER STANDARD TOPICS IN NEW WAYS...CLIENTS APPRECIATE THAT. - Norman Boone, Financial Advisor, Mosaic Financial Partners**

## ISSUE BRIEFS

Whitepapers explore timely philanthropic and impact investing themes. Go to [impactassets.org](http://impactassets.org) to view all 15 Issue Briefs.

### ISSUE BRIEF #15: CONSTRUCTION OF AN IMPACT PORTFOLIO

Impact Investing can be implemented across an entire portfolio with the same considerations as a traditional portfolio.

### ISSUE BRIEF #5: UNIFYING AN INVESTMENT PORTFOLIO WITHIN A DONOR ADVISED FUND

Donor advised funds can serve as a tax-effective entry point for those interested in impact investing.

## AT A GLANCE

Go to [impactassets.org](http://impactassets.org) to view all Advisor Tools

### TWO PAGER: FINANCIAL ADVISING FOR THE NEXT GENERATION

As Millennials transition into control of their wealth, they will choose to align their portfolios with their worldviews.

### HOW TO DONATE APPRECIATED STOCK FACT SHEET

Donating long-term appreciated stock directly to a donor advised fund is one of the most tax-effective ways for donors to give.

## VIDEOS

Go to [impactassets.org](http://impactassets.org) to view all Additional Resources

### VIDEO: IMPACT INVESTING FOR EVERYONE

Jed Emerson highlights how donor advised funds are enabling philanthropists to both give and invest in the causes they care about.

### VIDEO: INTRODUCTION TO IMPACT INVESTING

Ron Cordes, Co-Founder, ImpactAssets and Former Board Chairman, AssetMark, provides a high-level overview of the impact investing field.

## IMPACT INVESTING FUND MANAGER DATABASE

### IMPACTASSETS 50

A free annually updated database of 50 experienced impact investing fund managers across geographies, asset classes and impact areas of focus. The funds on this list are reviewed by a committee of experts at firms including Ford Foundation, Bain Capital, Tonic, UBS and The CAPROCK Group.

## THIRD PARTY RESOURCES

### ONLINE COURSE: FUNDAMENTALS OF SUSTAINABLE AND RESPONSIBLE INVESTMENT ([USSIF.ORG/COURSES](http://USSIF.ORG/COURSES))

The Forum for Responsible and Sustainable Investment (US SIF) offers an introductory resource for investment advisors, financial planners and other professionals who want to learn the basics of sustainable and responsible investing.

## ABOUT IMPACTASSETS

ImpactAssets is a nonprofit financial services firm that increases the flow of capital into investments that deliver financial, social and environmental returns.

ImpactAssets provides a donor advised fund, "The Giving Fund," Impact Investing Notes and educational resources to support philanthropists and investors looking to engage in impact investing.



**JED EMERSON,**  
**CHIEF IMPACT STRATEGIST**

Jed Emerson is an internationally recognized thought leader in impact investing, social entrepreneurship and strategic philanthropy.