

Impact Investing Resources For Advisors

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



IMPACTASSETS
INVEST WITH MEANING

“ 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 that explore timely philanthropic and impact investing themes.

[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.

[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.

FACT SHEETS

Resources for advisors that outline the benefits of impact investing through The ImpactAssets Donor Advised Fund.

[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](#)

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

VIDEOS

[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, sectors and asset classes. The funds on this list are reviewed by a committee of experts at firms including Ford Foundation, Tiedemann Wealth Management, Toniic, UBS and The CAPROCK Group.

THIRD PARTY RESOURCES

[ONLINE COURSE: FUNDAMENTALS OF SUSTAINABLE AND RESPONSIBLE INVESTMENT](#)

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.

The ImpactAssets Donor Advised Fund and field-building initiatives 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.