

ImpactAssets Builds Out Executive Leadership Team; Adds Trilli as Seasoned President and Chief Investment Officer, Promotes Freundlich to CEO

Margret Trilli brings strategic and executive leadership to extend organizational excellence and drive continued growth toward a multi-billion-dollar impact investing platform; founder Tim Freundlich promoted to Chief Executive Officer to lead business innovation and field-building; Gabe DiClerico named CFO to elevate finance administration capability.

BETHESDA, MD October 24, 2018 – [ImpactAssets](#), a nonprofit financial services firm that increases the flow of capital into investments delivering financial, social and environmental returns, today announced the addition of Margret Trilli to its executive leadership team as President and Chief Investment Officer, effective immediately. In this role, Margret will apply her deep investment and business building experience, and passion for impact investing, to drive extensive and sustainable growth at ImpactAssets. Founder Tim Freundlich has been promoted to Chief Executive Officer and will spearhead critical initiatives to keep ImpactAssets on the leading edge of impact investing.

“We started ImpactAssets in 2010 as a catalyst for increasing flows of capital to the world’s greatest challenges,” said Freundlich. “Today, as we approach \$500 million in donor advised funds and impact investments, our organization has matured and grown. Margret’s strategic leadership and investment experience will enable ImpactAssets to scale up and enhance our leading-edge impact investment offerings for individuals, advisors, corporations and other partners.”

Margret Trilli’s 25-year career includes executive leadership, investment and operating roles for large and small companies, including Barclays Global Investors/Blackrock and Charles Schwab. Her experience spans investment management, product management, strategy and planning, reengineering, turnarounds and business building.

She founded Intentional Capital, a boutique private equity firm serving custom direct investments to a select group of family offices, many of whom have fully developed impact investing strategies. Margret also serves on the boards and investment committees of three family offices. She graduated from Stanford Graduate School of Business and holds a degree in Economics from University of California Santa Barbara.

Trilli, along with the senior team and board of ImpactAssets, will lead the expansion of the organization’s five-year strategy and focus on product and business development for the next phase of growth. The addition of the President role will allow Freundlich to focus on innovation for corporations, ultra-high net worth families, and other institutional partners.



“I am excited to join Tim and the amazing team at ImpactAssets as we build on the impressive foundation and enter a new phase of growth,” said Trilli. “ImpactAssets is so much more than a donor advised fund; it’s a massive impact investing platform positioned to catalyze billions toward great social impact. I couldn’t pass up the opportunity to be a part of that!”

In addition, ImpactAssets announced the recent promotion of Gabe DiClerico to Chief Financial Officer. With over 15 years’ experience in impact investing, DiClerico has helped set up and implement organizational strategy, as well as financial and administrative processes since the inception of ImpactAssets.

“This is a coming of age moment for ImpactAssets – and also reflects the maturation of the greater impact investing story,” said Board Chair Charly Kleissner. “Our opportunity as an organization is so great – and the need for us to continue to lead still so critical – that this bolstering of executive leadership ensures ImpactAssets will remain at the forefront of an exciting and necessary transformation of the financial system.”

About ImpactAssets

ImpactAssets is a nonprofit financial services firm that increases the flow of capital into investments delivering financial, social and environmental returns. ImpactAssets’ donor advised fund (“The Giving Fund”) and field-building initiatives enable philanthropists, other asset owners and their wealth advisors advance social or environmental change through impact investment and philanthropy. The Giving Fund currently has nearly \$500M in assets from more than 1,100 donor advised funds, working with 300 wealth advisors across 50 financial services firms.

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