

# INVEST IN TRANSFORMATIVE CHANGE

Whether you're looking to help mitigate climate change, build equitable communities, or provide educational opportunities for all – CapShift makes it easy to find impact investments aligned with your passion. We work closely with your existing financial or philanthropic institutions to help you discover, diligence, and deploy capital into unique impact opportunities for your traditional portfolio, foundation assets, or donor advised fund account. And, once implemented, we'll help you understand the impact you're making through regular impact reporting.

## Investments that bring your theory of change to life

CapShift can quickly connect you to impact opportunities that support your goals using our proprietary Research Engine, which includes more than 750 private funds, direct investments, and recoverable grants across a wide array of local and global impact areas. The depth of our expertise and the diversity of impact sectors and asset classes we offer allows us to help you to support the causes that matter most to you, and across an array of return, risk, and liquidity requirements.

## Popular impact themes



And dozens more impact areas across the United Nations Sustainable Development Goals

## Catalyzing your philanthropic dollars

For charitable accounts, CapShift uniquely enables both investments targeting risk-adjusted market rate returns, as well as impact first investments and recoverable grants that prioritize deeper or more scalable change. Recoverable grants are just what they sound like – grants that can potentially return capital to a donor advised fund or other philanthropic entity if the nonprofit achieves their goals. Donors can use this powerful tool to provide much needed risk capital to nonprofit innovators and have the opportunity to recover those philanthropic dollars and reuse them for future granting. Nonprofits typically use impact first investments and recoverable grant capital in three ways:

To bridge a funding gap

To scale a revenue generating program quickly

To invest in trailblazing and high-impact solutions

## Solutions designed to meet your goals

CapShift can work with your existing financial advisor to incorporate impact investments into your personal, foundation, or family office assets. We can source and research investments that align with the impact themes you care about and work with your financial advisor to provide all the details you'll need to get started on or deepen your impact journey. We will help you take action to create the change you want to see for a brighter tomorrow.

## Stay connected to your impact

After your investments and recoverable grants have been deployed, CapShift's impact reporting and monitoring will help you understand and stay connected to the impact you're making. Regular impact reports from CapShift keep you up to date on the stories, outputs, and vision behind each of the opportunities you've supported.

## Ready to get started?

Contact us today to discuss how CapShift can support your financial and philanthropic impact goals by emailing us at [hello@capshift.com](mailto:hello@capshift.com).

## About CapShift



CapShift's impact investing platform and suite of solutions empower financial and philanthropic institutions, and their clients, to invest in their vision for a better tomorrow. We do this by providing rigorously researched, easy to access, and cost-effective impact investing and recoverable grant opportunities to donor advised fund holders, family offices, advisors, and foundations. CapShift has partnered with dozens of financial institutions to mobilize hundreds of millions of dollars of capital across a range of impact investments. Visit [capshift.com](https://capshift.com) to learn more about us and the capital that we have mobilized for purpose to date.

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