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**ValuesAdvisor**



# VA Origin Story

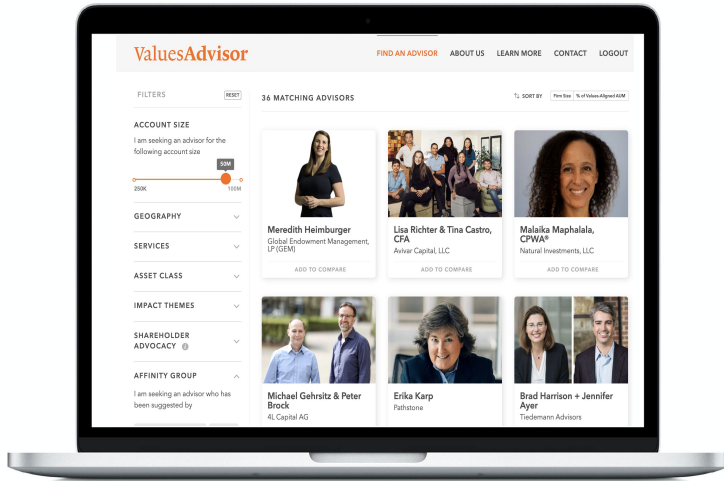
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Lisa Renstrom, Founder, Impact Investor & Philanthropist:

- A financial return AND a social return is doable and satisfying.
- Realization was just the first step. Wanted a financial advisor expert in supporting the impact journey.
- Time consuming and tedious research and due diligence - friends, online research, contacting firms, and digging into reports.
- Ran DivestInvest. Investors pledged to divest, but said, "My advisor has no idea how to invest fossil free".
- After her personal laborious search -- and having learned of some stellar professionals in the process -- she decided to create a resource for people to make it easy to align their money with their values and move money to impact.

# What is ValuesAdvisor?

- Filterable, online platform with a curated collection of financial advisors with impact expertise who help HNW investors align their money with their values.
- A nonprofit, field building tool that is offered at no cost to our partners and their members.



# How Will You Benefit from ValuesAdvisor?

1. An **in-depth marketing opportunity** that amplifies your work via private forums, networks, events, and trainings to Values-Forward HNW/UNHW investors, historically an elusive, hard-to-reach segment of investors, with high cost entry points.
2. **Saves you time** completing RFQs and RFPs, connecting you directly to prospects that fit your client profile.
3. **Saves you resources** by educating investors about your services - so they only reach out to you if there's a fit with your services.
4. Makes it easier to find you so **new capital is driven to impact** - helping to alleviate poverty, mitigating climate change, advancing women and BIPOC-led businesses, etc.
5. Participate in maintaining **field integrity & transparency**. Your participation in VA reinforces your leadership by contributing to a non-profit tool that combats greenwashing.

# > In-Depth Marketing Opportunity



## > Amplify Your Work to Values-Forward Asset Owners

Our personal relationships with progressive HNW individuals, institutional investors & foundations leverages your marketing at a below-market price point.



Annual fee for advisor membership in networks with HNW investors range between \$1,000 to \$12,000, averaging \$6,300.

## > Save You Time



Connect to prospects that fit your ideal client profile, reducing the RFPs & RFQs you need to complete for unqualified investors.

Unique filters allow users to narrow the universe to more quickly find you

### ACCOUNT SIZE

I am seeking an advisor for the following account size



### GEOGRAPHY

### SERVICES

The advisor specializes in (select all applies)

- Impact-First Investing
- Diligence on Funds & Direct Investments
- Wealth, tax, & retirement planning
- Foundation Services
- Family Office Services
- Philanthropic Impact Tools
- Impact Reporting
- Values Clarification/ Theory of Change Development
- Redistribution

### ASSET CLASS

I want to invest with impact in the following asset classes

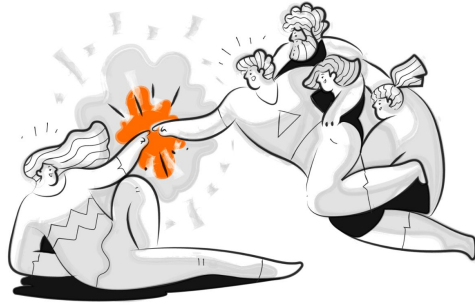
- Deposit/cash equivalent
- Public debt
- Public equity
- Private debt
- Private equity
- Direct investments
- Real assets
- Community loan funds/CDFIs
- Hedge funds

### IMPACT THEMES

I am looking to contribute to solutions in these specific areas

- Affordable & Clean Energy
- Clean Water & Sanitation
- Racial Equity
- Gender Equity
- Zero Hunger, No Poverty
- Good Health & Healthcare
- Sustainable Agriculture & Food Systems
- Local Investing
- Sustainable Cities & Communities
- Responsible Consumption & Production


> Save You Resources



Investors choose you based on the narrative you write about your services and specific expertise.

Easy navigation and clear information structure allows investors to get to know you quickly

ValuesAdvisor
Advisor Profile: Scott Fidele



**Scott Fidele**  
Chief Investment Office | Fidele & Self

Suggested by:  
Tonic  
rachel@robasciotti.com

Firm's AUM < 125M

21% Team's Values-Aligned AUM

**HEADQUARTERS**  
870 Market Street Suite  
1275 San Francisco  
CA 94102, United States  
robasciotti.com

**OTHER OFFICES**  
San Francisco, CA

**About the Firm**

We build bridges that bring the investment industry into deep alignment with social justice movements. Experts at translating deep listening into financial strategies, we structure money to generate individual and collective good. Our impact investing platform, RISE (Return on Investment & Social Equity), uses the industry's first ever community-developed social screen. RISE centers the voices of those most impacted by systems of oppression when defining impact and seeking to earn a reasonable financial return. Together, we build coalitions that influence the behavior of publicly traded companies and leverage the power of investing to make real change.

PERCENTAGE OF WOMEN IN:

The Firm	Senior Position	Board of Directors
100%	100%	100%

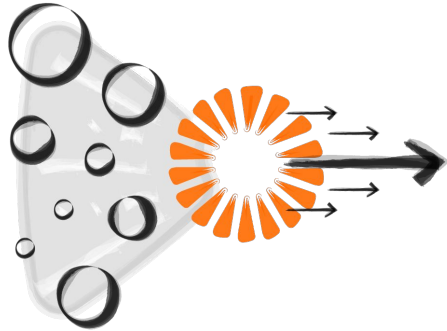
PERCENTAGE OF PEOPLE OF COLOR IN:

**REPORTS**

- [sample newsletter](#)
- [research report](#)
- [thought leadership publication](#)
- [Impact Blog Posts](#)
- [TEDx Talk on the Future of Capitalism](#)
- [SOCAP Plenary Talk on Behavioral Finance](#)
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- [TEDx Talk on the Future of Capitalism](#)
- [SOCAP Plenary Talk on Behavioral Finance](#)
- [Matthew's YouTube Challenge](#)



# > Drive New Capital to Impact



ValuesAdvisor makes it easier for new impact investors to find you –

Moving new money into addressing poverty, mitigating climate change, advancing women and BIPOC-led businesses and other critical issues.

ValuesAdvisor introduces traditional investor groups to values aligned investing

**WDN** WOMEN DONORS NETWORK

## Find Your Values-Based Investment Advisor

with Lisa Renstrom of ValuesAdvisor

APRIL 5  
9 AM PT / 12 PM ET

**Register Today**

- Learn how to navigate the platform.
- Get tips for how to make the most out of the site.
- Hear testimonial from a WDN member who has used ValuesAdvisor.

**WDN WDN ACTION NEWS**  
Fund Research, Power Justice

Interview with Kate Simpson  
Co-Founder  
@katesimpson

**A New Tool for WDN Members Who Want to Invest With Their Values**

**Learn More**

**ValuesAdvisor**

### Investing With Your Values

When you're ready to invest with your values, ValuesAdvisor offers you a one-stop shop for learning about the top financial advisors who deliver both financial and environmental/social returns.

In the platform you can explore and connect with advisors:

- Filter by geography, impact level, services, firm size, asset class
- Search by the impact themes and issues that matter to you
- Gain unique insight in advisors' impact experience, measurement, female and BIPOC leadership, reports, shareholder advocacy, and more.

**Click the JOIN NOW button below and enter the Partner Code "WFN" for complimentary access to the site.**

**JOIN NOW**

**SV2**

Who We Are - What We Do - Who We Support - Our Impact - Events - News

mySV2 Get Involved - Contact Us

Past Events

Filter by Event Type - Filter by Event Topic

**Wednesday, October 6, 2021**  
12:00 pm - 1:00 pm

### Impact Investing Interest Circle

SV2 is excited to partner with ValuesAdvisor, an online searchable database to help you find a values aligned investment advisor that meets your needs. The platform offers a simple and dynamic interface that allows investors to filter advisors.

**WOMEN WITH CAPITAL**

## Webinar

6/7/22

**The Beam NETWORK**

## Webinar

6/29/22

## > Maintain Field Integrity & Transparency



Your participation in VA reinforces your leadership in maintaining the integrity of the field and contributes to a non-profit tool that helps diminish greenwashing.

The questions you answer to highlight your impact expertise

Impact Measurement and Reporting

Team's Leadership in the Impact Field

### Impact Genesis Story

Case Study: an example of how the team has engaged with company management, filed or co-filed an ESG related shareholder resolution

Team's Investment Philosophy and Style

How the Team Enables the Clients to Vote Their Proxies

Case Study: an Example of a Meaningful Investment

Process of Identifying, Evaluating, and Selecting Investment Opportunities

Discerning Goals and Priorities

Past or Ongoing Litigation, Regulatory Actions, or Government Investigations Involving the Firm or the Team

UN SDG Implementation United Nations Sustainable Development Goals

Available Resources to Help Clients Make Better Decisions

ADV (SEC Public Disclosure) – Required

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Where have our advisors  
been seen this year?

# > ValuesAdvisor Outreach



REGISTRATION ENDS FEB. 25

March 8-10 | Loews Santa Monica Beach Hotel | Santa Monica, CA

[Reserve Your Spot & Book Your Room](#)

### Pre-Conference Welcome Intensive

Monday, March 7, 2022

(Open to Investors Only)



**Jeff Emerson**  
Global Lead of Impact Investing  
Tiedemann Advisors



**Meredith Heimburger**  
Principal, Director of Impact, Global Endowment Management



**Lisa Renstrom**  
Founder  
ValuesAdvisor



**Zac Russell**  
Senior Advisor & Vice President of Board  
Kloientine Fund

The Welcome Intensive provides an introduction to the concepts of values-based investing in an expert-led, small group setting. This program is intended for asset owners new to values-based investing and offers a unique opportunity to dive into the Confluence community with a cohort of new peers and allies. Facilitators will lead an afternoon discussion about fiduciary duty, engaging investment advisors and other topics critical to a new investor. The Welcome Intensive will conclude with a special dinner hosted by the facilitators and Confluence staff.

#### Advance Registration Required

Add Monday's Pre-Conference Welcome Intensive during the registration process.

If you already signed up for the Gathering, you may [log back into your registration now](#) to add Monday's session.

**Note:** This session is only open to foundation executives, trustees or donors and not intended for professional investment advisors.

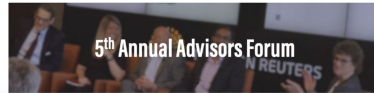


ValuesAdvisor

Confluence and ValuesAdvisor will host a networking reception immediately following the Advisors Forum on Thursday, June 2nd from 5 – 6:30pm at the Ford Foundation Center for Social Justice.

All firms listed on the ValuesAdvisor platform are welcome to attend the reception. For those participating in the conference, the reception is included in the Thursday June 2 ticket price. If your firm is on the ValuesAdvisor platform and you are not a Confluence member but would like to attend the reception or event(s) as a guest please [click here to complete this brief form](#). Advance registration is required.

For any other questions about registration options please [contact us](#).



### INVESTMENT ADVISOR PLATFORM

**Free Subscription to ValuesAdvisor, a Values-Based Investment Advisor Platform**

GIIN members are invited to sign up for a free subscription to ValuesAdvisor, the only non-profit platform offering investors the opportunity to search for an experienced values-based investment advisor. GIIN Investors' Council

# > ValuesAdvisor Outreach



**Find Your Values-Based Investment Advisor**  
with Lisa Renstrom of ValuesAdvisor



APRIL 5  
9 AM PT / 12 PM ET

WDN

Are you looking for an advisor to counsel you on your impact investing journey? Something exciting has grown out of our Impact Investing Series: **ValuesAdvisor**, the only non-profit platform offering investors the opportunity to search for an experienced values-aligned investment advisor, is giving WDN members a free subscription. The platform makes it easy for you to find an advisor with qualitative and quantitative information along with geography, impact areas, firm size, and asset class filters. To get started with ValuesAdvisor, go to [valuesadvisor.com/join](https://valuesadvisor.com/join) to register and input the code WDN for complimentary access.

Their **Co-Founder Lisa Renstrom** will join us on April 5 to give a tutorial of the site. Join the webinar to:

- Learn how to navigate the platform.
- Get tips for how to make the most out of the site.
- Hear testimonial from a WDN member who has used ValuesAdvisor.

WDN WDN ACTION NEWS  
Fund Movements. Power Justice.



Interview with  
**Kate Simpson**  
Co-Founder,  
ValuesAdvisor

Women Founders Network <darya@womenfoundersnetwork.com>  
on behalf of  
Women Founders Network <patti@womenfoundersnetwork.or...>  
To: kim@womenfoundersnetwork.com

Thursday, April 21, 2022

Wednesday, October 6, 2021  
12:00 pm-1:00 pm

## ValuesAdvisor

### Investing With Your Values

When you're ready to invest with your values, ValuesAdvisor offers you a one-stop shop for learning about the top financial advisors who deliver both financial and environmental/social returns.

- In the platform you can explore and connect with advisors:
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  - Gain unique insight in advisors' impact experience, measurement, female and BIPOC leadership, reports, shareholder advocacy, and more.

Click the **JOIN NOW** button below and enter the Partner Code "WFN" for complimentary access to the site.

JOIN NOW

## SV2 news

### Values-Aligned Investing Workshop



Join ValuesAdvisor's Kate Simpson and SV2 CEO David Onak for a two-session workshop on Values-Aligned Investing on May 12 and May 19. With a focus on interactive discussion and community building, the workshop will help you better align your investments with your values. You will be guided through a unique, personal reflection journey that incorporates guided meditations with group work and journal writing. The workshop is designed for all levels of expertise, from novice impact investors to experienced practitioners. Key elements include:

- Explore your money story, the origin of your relationship with money
- Identify your money mindset and limiting beliefs you may hold about money
- Determine what is deeply important to you, personally and in the broader world
- Learn the basics about the impact investing field: the categories of impact and impact examples within each asset class
- Craft a written "values" investment policy statement

### Impact Investing Interest Circle

SV2 is excited to partner with ValuesAdvisor, an online searchable database to help you find a values aligned investment advisor that meets your needs. The platform offers a simple and dynamic interface that allow investors to filter advisor...

# > ValuesAdvisor Outreach



**Ellen Remmer** · 1st  
Co-Founder, Invest for Better and Senior Partner,  
The Philanthropic Initiative  
19h · 🌐

Excited to be moderating this panel with **Michelle Hoerum**, **Julie Goodridge** and **Lauren Wood**, CFA, CFP® on choosing a values-aligned financial advisor. Many thanks to **ValuesAdvisor** for being a great partner with us **Invest for Better**

**Invest for Better**  
885 followers  
4d · 🌐

Ellen Remmer will moderate a panel of three values-aligned financial advisors, each of which is highlighted on the ValuesAdvisor ...see more



Here are 2-page overviews of each of the Summer 2022 Deep Dive courses!

Winter 2022 Circle Members should consult with their Circle Leader to decide on enrollment plans. Circles can decide to stay together—partially or entirely—to complete the courses, or you can enroll as an individual and be matched to a new group!

For more information, see the previously-posted DEEP DIVE COURSES: INFO SESSION RECORDING

Enrollment Form is here: <https://forms.office.com/r/kv3l3ic2k>

\*Please courses (and a brand new crop) will be offered again in October.\*\*

· **Back to the Basics: Financial Planning**

FB Deep Dive Course Financial Planning Summer 2022.pdf

· **Values Align Your Stock Portfolio**

FB Deep Dive Course Public Equities Summer 2022.pdf

· **How Angel Investing Works**

FB Deep Dive Course Summer 2022 Angel Investing.pdf

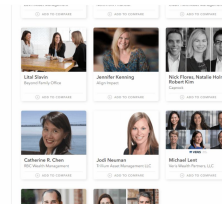
· **Find a Values-Aligned Financial Advisor**

FB Deep Dive Course Financial Advisors Summer 2022.pdf

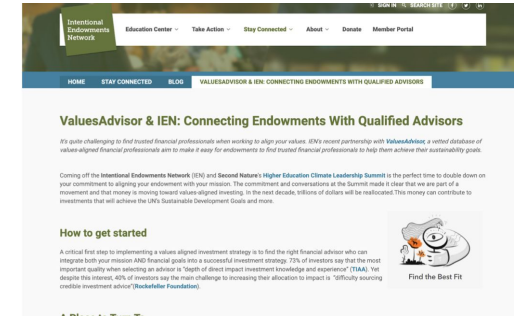


## ValuesAdvisor

ValuesAdvisor supports Tonic members in finding values-aligned financial advisors and strategic consultants. Access is complimentary to Tonic members (\$250 annual cost for non-members)



Membership Benefits | Impact Support



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Let's get started.

# Advisor Criteria

- › Be recommended by at least one member of a ValuesAdvisor Partner Affinity Group.
- › Offer impact-based financial advisory services as a core business (demonstrated by approximately 25% or more of current AUM of advisor/team and highlighted on the advisor's website).
- › Demonstrate significant knowledge of the impact investing field (offering values aligned investment options for a minimum of three years and/or expertise as determined by ValuesAdvisor).

Participation in ValuesAdvisor is personal to the named Lead Advisor and either the team or firm they lead.

Any number of teams within a larger institution may be listed on ValuesAdvisor if they qualify on all criteria, and have distinct, unique impact offerings and expertise, or the entire firm may be listed if it meets the criteria.



## > Annual Fee Based on AUM

Lead Advisor/Team AUM	2022-23 Annual Fee
<\$50M	\$900
\$50-\$500M	\$1,100
\$500M-\$1B	\$1,800
\$1B-\$5B	\$2,800
\$5B-\$20B	\$4,900
\$20B-\$50B	\$5,700
>\$50B	\$7,500

Fees are good for 1 year from date of payment.  
 Fees may increase annually based on the number of affinity group partnerships.  
 Fees are not tax-deductible.

### Large Firm Fee Option (>\$20B AUM)

For Firms with greater than \$20B AUM, ValuesAdvisor offers the option of paying \$9,600 for three unique profiles on the platform that represent discrete divisions of the firm (i.e. non-profit, individual wealth management, institutional, etc.) with differentiated impact investment offerings.

*Individual teams within that firm, who meet our existing criteria, will still be able to join under the regular fee schedule.*

## > About Us

We strive to model sustainable growth.

Who are we?

We are a small team with decades of experience and relationships in the values aligned investing field. We seek to emulate the type of growth we wish to see in finance - sustainable. Our aim is not to “grow at all cost,” but to thoughtfully support you and our Users to accelerate the movement of money to impact.

Thank you!

## > Questions?

Contact Kate Simpson:  
[kate@valuesadvisor.com](mailto:kate@valuesadvisor.com)



Lisa Renstrom



Megan Morrice



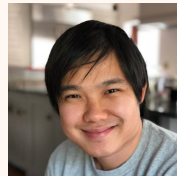
Kate Simpson



Ian Brownell



Sarah Ingersoll



Bin Huang



Leonardo Jimenez