



National
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Trust

Your partner in giving



AMPLIFY YOUR IMPACT: IMPACT INVESTING

National Philanthropic Trust donors are continually looking for innovative ways to make a positive difference with their charitable gifts, and many are increasingly turning to impact investments. Impact investing's double bottom-line means philanthropists can generate both a social and financial return with their donor-advised fund assets. We invite you to learn more about NPT's impact investment offering and join us in maximizing your impact around the country and the world.

ETF Impact Investment Offerings

NPT offers exchange-traded funds (ETFs) that address a range of social and environmental issue areas. Some actively consider environmental and social factors in their selection of stocks (SHE, CRBN, MPCT), while others positively weight companies that perform well on Environmental, Social and Governance (ESG) factors (SUSA, ESGD, DSI).

| FUND NAME | TICKER | IMPACT AREA |
|---|--------|--|
| iShares MSCI USA ESG Select | SUSA | Environmental, Social and Governance (ESG), among U.S. companies excluding tobacco |
| SPDR® State Street Global Advisors Gender Diversity Index ETF | SHE | Gender diversity among U.S. companies |
| iShares MSCI EAFE ESG Select ETF | ESGD | Environmental, Social and Governance (ESG) among companies in Europe, Australia, Asia and the Far East |
| iShares MSCI ACWI Low Carbon Target ETF | CRBN | Carbon exposure among global companies |
| iShares Sustainable MSCI Global Impact | MPCT | U.N. Sustainable Goals among global companies |
| iShares MSCI KLD 400 Social ETF | DSI | Environmental, Social and Governance (ESG) among U.S. companies |



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Impact Notes Offerings

NPT also offers four impact notes, which allow donors to select from a range of maturity dates, minimum dollar thresholds and themes. For example, donors can invest in a 3-month note that focuses on food and agriculture, or a 2-year note that focuses on affordable housing. For more information about these impact investment vehicles, please reference the Impact Notes Allocation Form.

| | MINIMUM INVESTMENT | MATURITY | INVESTMENT PERIODS | IMPACT INVESTMENT THEMES |
|--------------------------------------|--------------------|-------------------------------------|------------------------------|--|
| Enterprise Community Partners | \$5,000 minimum | 2-year note interest rate ~1.5% | Quarterly investment periods | - Affordable housing - Solar energy |
| RSF Social Finance | \$1,000 minimum | 3-month note interest rate ~.25% | Quarterly investment periods | - Food and agriculture - Education and the arts - Ecological stewardship |
| Root Capital | \$10,000 minimum | 1-year note interest rate ~1.5% | Monthly investment periods | - International focus (specifically on Africa and Latin America) - Sustainable agriculture - Women’s issues |
| Calvert Foundation | \$1,000 minimum | 1-year note interest rate 1.0% | Monthly investment periods | - Affordable housing - Community development - International microfinance - Fair trade - Social enterprise |

How to Invest in NPT’s Impact Investments

The steps to align your charitable investments with your values are simple:

- If you would like to invest in NPT’s Impact ETFs, please complete the **Investment Allocation** form and indicate your selections under “**Option 3: Personal Giving Strategy.**”
- If you would like to invest in NPT’s Impact Notes, please complete the Impact Notes Allocation form in addition to the Investment Allocation form.
- Donors with a donor-advised fund account balance above \$500,000 may recommend alternative investments, subject to NPT’s review and approval. If you are interested in investing your donor-advised fund assets in impact strategies outside of NPT’s current offerings, please contact us at (888) 878-7900.

For more than 20 years, NPT has helped our donors support the causes they care most about. For questions or more information about how we help you meet your philanthropic goals, including impact investing, please contact us at (888) 878-7900 or by email at npt@nptrust.org