



National
Philanthropic
Trust

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PRESS RELEASE

National Philanthropic Trust Introduces Four Proprietary Impact Investment Options For Its Donor-Advised Fund Donors

DAF sponsor offers peer-leading impact investment options to support donor goals of increasing philanthropic impact

JENKINTOWN, PA, October 15, 2019 – National Philanthropic Trust (NPT), the nation’s largest, independent sponsor of donor-advised funds (DAFs), today unveiled four new, proprietary impact investing portfolios, which will allow donors to achieve both social and financial returns on their DAF investments.

“With these groundbreaking new impact portfolios, our donors can amplify the charitable impact they are having in the world,” says Eileen Heisman, CEO of NPT. “In addition to recommending grants to support such goals as clean energy, gender diversity and affordable basic services in housing, healthcare and education, they can now recommend investments that also champion solutions to these challenges.”

The four thematic portfolios, which address many of the United Nations’ Sustainable Development Goals, were created after more than a year of research and due diligence. By identifying and selecting CapShift, an impact investing solution provider for DAF sponsors, as our partner we are able to leverage their experienced team to help build tailored and thoughtful portfolios that meet our donors’ unique interests¹:

- NPT Economic Mobility: Seeks economic opportunity for all with a focus on underserved communities
- NPT Environmental Stewardship: Manages climate change risks and protects and conserves natural resources
- NPT Gender Lens: Supports the advancement of women in the workplace and beyond
- NPT Broad Social Impact: Advances solutions to global challenges, including conservation, financial inclusion and access to healthcare

Each impact portfolio offers a single investment solution for the designated focus area. Donors can now easily choose an impact allocation for their DAFs. Included in the portfolios are traditional ESG funds that both screen out companies with less favorable practices and select those with favorable practices. They also include investments that have the explicit goal of generating positive, measurable social impact alongside competitive financial returns. Equally important, each portfolio provides sufficient liquidity to support our donors’ ongoing and substantial grant making.

“Since NPT initially began offering impact investing solutions in 2015, both our donors’ interest in impact investing and the market itself have grown substantially,” said Heisman. “It was the right time to research the best, next-generation investments for our donors. We hope to help them achieve their philanthropic goals with a favorable bottom line.”

According to the Global Impact Investing Network, total assets under management in impact investments (investments made with the intention to generate social/environmental impact and financial return) have doubled

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year-over-year to \$502 billion in 2018. Investment performance has been strong, with 90% of impact investment managers reporting performance in line with or exceeding both their financial and their impact expectations, according to GIIN's 2019 annual survey.

Visit NPT's impact investing web page to learn more about the impact investing portfolios we offer our donors to help them achieve their philanthropic vision.

ABOUT NATIONAL PHILANTHROPIC TRUST

Founded in 1996, National Philanthropic Trust is the largest national, independent donor-advised fund sponsor and has made more than 273,000 grants totaling \$6.8 billion to charities around the world. NPT has raised more than \$13.5 billion in charitable contributions and currently manages \$8.1 billion in charitable assets. NPT ranks among the largest grantmaking organizations in the US. NPT annually publishes the Donor-Advised Fund Report, the industry's authority on the state of DAF giving. In 2016, NPT launched HistoryofGiving.org, the world's first and most comprehensive digital narrative of the last 500 years in philanthropy. Learn more at NPTrust.org.

ABOUT CAPSHIFT

CapShift is an impact investing platform that empowers philanthropic and financial institutions along with their clients to mobilize capital for social and environmental change. CapShift provides access to public, private, and nonprofit ventures and funds, operating globally and locally across all themes, supported by leading impact investors. Their suite of solutions makes it easy to source, implement, and monitor impact investments.