



National
Philanthropic
Trust

Your partner in giving



Impact Investing with NPT: A Complete Portfolio Solution

At National Philanthropic Trust, we recognize the powerful potential of impact investing in helping you achieve your philanthropic goals. By putting your assets to work to generate a positive social return in addition to a financial one, impact investing can offer you a double bottom line. It also helps ensure that your funds are working toward the good you want to see even before you've recommended a grant.

We invite you to learn more about NPT's impact portfolios – designed in partnership with CapShift, an industry-leading provider of quality impact investing solutions.

IMPACT PORTFOLIOS

Each of NPT's four impact portfolios offers a single impact investing solution for a designated focus area. You may allocate your donor-advised fund (DAF) assets into one or all four impact investment strategies; you can even elect to divide your assets among NPT's impact portfolios and our traditional model portfolios and money market mutual funds.

While the impact goals of the portfolios vary, all four portfolios share a similar investment goal of providing long-term capital growth and reasonable capital preservation through an asset allocation that may include managed mutual funds, ETFs, separately managed accounts and cash holdings. One portfolio may also include alternative investments.

Each impact portfolio has sufficient liquidity to support your ongoing grant recommendations and is appropriate for donors who plan to recommend granting the balance of their DAF within 10 years and for donors with a longer term horizon.

PORTFOLIO OVERVIEWS

ECONOMIC MOBILITY	ENVIRONMENTAL STEWARDSHIP	GENDER LENS	BROAD SOCIAL IMPACT
<p>IMPACT GOAL: Seeks to create economic opportunity for all with a focus on underserved communities</p>	<p>IMPACT GOAL: Manages climate change risks and protects and conserves natural resources</p>	<p>IMPACT GOAL: Supports the advancement of women in the workplace and beyond</p>	<p>IMPACT GOAL: Advances solutions to global challenges, including conservation, financial inclusion and access to healthcare</p>
<p>STRATEGY:</p> <ul style="list-style-type: none"> • Funds companies developing products and services for the underserved, particularly in developing markets • Invests in companies and municipalities offering fair wages and benefits to employees • Screens out companies with poor track records in the way they treat employees, suppliers and the community 	<p>STRATEGY:</p> <ul style="list-style-type: none"> • Funds companies developing solutions to climate change challenges • Invests in companies that have reduced greenhouse gas emissions and overall resource consumption • Screens out companies and municipalities with poor environmental practices 	<p>STRATEGY:</p> <ul style="list-style-type: none"> • Invests in companies providing advancement opportunities for women and equal pay • Lends capital to businesses led by women or that promote the welfare of women and girls • Holds mutual funds with strong financial and social performance that are managed by women 	<p>STRATEGY:</p> <ul style="list-style-type: none"> • Funds organizations that lend to low-income families and small businesses that lack access to formal banking • Invests in companies developing solutions to aid the least advantaged and help conserve natural resources • Screens out companies with poor track records in how they treat employees, the environment and their communities
Moderate Profile	Moderate Profile	Moderate Profile	Growth Profile

How to Get Started in Impact Investing at NPT

If you're interested in aligning your charitable assets with your grantmaking efforts, please take these simple steps:

- If you already have a DAF with NPT, you can recommend moving some or all of your DAF's assets into our impact investments by completing the **Investment Reallocation** form and selecting one or more of the impact portfolios.
- If you are just opening a DAF, you'll find NPT's impact portfolios listed under the Investment Allocation section of our **Donor Application for Individuals**.
- Donors with a DAF account balance of more than \$500,000 may also recommend alternative impact investments, subject to NPT's review and approval. If you're interested in investing your DAF assets in impact strategies outside of NPT's portfolio offerings, please contact us.

National Philanthropic Trust is proud to be the nation's largest sponsor of donor-advised funds to offer thematic portfolios aligned with specific social and environmental outcomes. For more information on impact investing and other ways we help our donors support the causes they care most about, please contact us at (888) 878-7900 or at npt@nptrust.org.