



National
Philanthropic
Trust

Your partner in giving



Impact Investing with NPT: Providing Solutions for Every Donor

Impact investing has the powerful potential to help you achieve your philanthropic goals. By putting 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 ensures that your charitable funds are working toward the good you want to see even before you've recommended a grant.





We invite you to learn more about National Philanthropic Trust's unique impact investing platform, designed in partnership with CapShift, a leading provider of impact investing solutions. We offer donors both impact portfolios and private impact investments, as well as the opportunity to propose investments that are not currently offered on our curated menu.

No matter what challenge you seek to address—from affordable housing to sustainable energy—our mission is to help you turn every charitable dollar into catalytic capital.

"This is an opportunity for donors to recommend investments that align with their grantmaking goals and work to address some of the greatest challenges we face in our world today."

- Eileen R. Heisman, President and CEO, National Philanthropic Trust

We offer impact investing solutions to address the following goals:

<p>Economic Mobility</p>  <p>IMPACT GOAL: Expand economic opportunity for all with a focus on underserved communities.</p>	<p>Environmental Stewardship</p>  <p>IMPACT GOAL: Manage climate change risks and protect and conserve natural resources.</p>	<p>Gender Lens</p>  <p>IMPACT GOAL: Support the advancement of women in the workplace and beyond.</p>	<p>Broad Social Impact</p>  <p>IMPACT GOAL: Advance global solutions to conservation, financial inclusion, and access to healthcare.</p>
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■ OPTION 1: Thematic Impact Portfolios

Our industry-leading portfolios provide a complete, diversified allocation strategy for your donor-advised fund (DAF) in a single investment vehicle. They also offer optimal liquidity for your grantmaking needs. You may allocate your DAF assets into one or all four impact investment strategies; or you may recommend an investment allocation across NPT's impact portfolios, our traditional model portfolios and money market mutual funds.

While impact goals vary, all four of the thematic impact 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, exchange-traded funds (ETFs), separately managed accounts and cash holdings. The Broad Social Impact portfolio may also include alternative investments.

THEMATIC PORTFOLIOS DESCRIPTIONS

ECONOMIC MOBILITY	ENVIRONMENTAL STEWARDSHIP	GENDER LENS	BROAD SOCIAL IMPACT
Funds companies developing products and services for the underserved and offering fair wages and benefits to employees.	Funds companies developing solutions to climate change challenges and that have reduced greenhouse gas emissions and overall resource consumption.	Funds companies led by women, providing advancement opportunities and equal pay for women, and/or promoting the welfare of women and girls.	Funds companies developing solutions to conserve natural resources and companies lending to low-income families and to those who lack access to formal banking.

Learn more about these portfolios at nptrust.org/impact-investing.

■ OPTION 2: Customized Impact Investments

If you prefer to build your own charitable investment portfolio to meet specific financial and charitable goals, we offer a customized impact investing platform. Donors with DAF accounts of more than \$500,000 can access a wide range of curated impact investment opportunities focusing on such areas as clean energy, health, education, affordable housing, economic mobility and more. Some of the private impact investments on our platform also promote racial equity and work to address challenges created by the COVID-19 pandemic.

From the options available on our customized impact investment platform, a donor may choose to invest in any number of funds designed to address a specific impact opportunity. Donors may invest across a range of issues or concentrate their interest in funds that support one of our four thematic focus areas. Below is a sample of funds a donor may select from our platform:

CUSTOMIZED INVESTMENT EXAMPLES

- Global business loan fund provides short-term capital to small- and medium-sized businesses to drive growth and **economic mobility** in underserved communities.

- Private infrastructure fund promotes **environmental stewardship** by investing in and managing infrastructure for renewable energy, with projects including solar assets, wind power plants and other sustainable initiatives.

- Microfinance fund backed by philanthropic guarantees takes a **gender lens** to its lending strategy, advancing credit and financial services for underserved individuals, primarily women in rural areas.

- Private credit fund supports **broad social impact** by providing flexible credit-oriented and bridge debt to growth-state companies meeting unmet needs linked to the U.N.'s Sustainable Development Goals.

You and your advisor can use the CapShift platform to explore opportunities and monitor the financial and impact results of your DAF's investments. All of the opportunities on the CapShift platform are pre-approved by NPT, and many are offered at lower minimum investment levels than are available outside of your DAF. If you wish to recommend impact investments that are not on the CapShift platform, you can propose them for review.

Learn more about customized impact investing at nptrust.org/customized-impact-investing.

Get Started

NEW DONORS

- *Thematic Portfolios:* As you complete the [donor application](#), you may select from NPT's thematic impact portfolios when recommending an investment strategy for your DAF.
- *Customized Impact Investing:* If you plan to establish a DAF account with \$500,000 or more and are interested in a customized option, please log on to www.nptrust.org/customized-impact-investing and answer a few simple questions to get started.

CURRENT DONORS

- *Thematic Portfolios:* You may recommend a new investment strategy at any time and can easily allocate DAF assets into NPT's impact portfolios. Log in to your DAF account via [the donor portal](#) and click on the Investments page to recommend a reallocation.
- *Customized Impact Investing:* If your DAF account has a balance of \$500,000 or more, you may complete the [form on our website](#) and a member of our team will be in touch.

[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 about most, please contact us at (888) 878-7900 or at npt@nptrust.org.

[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.