

Unlock Impact Investing within Donor Advised Funds

Powered by CapShift in partnership with leading charitable sponsors

Donor advised funds (DAFs) are an excellent vehicle for strategic charitable giving but are limited in their impact investing capabilities--leaving donors increasingly dissatisfied. More and more, donors seek to expand their impact investing options, enjoy greater flexibility in customizing their DAF portfolio, and align their investments to drive their impact goals.

CapShift empowers advisors to unlock impact investing for their clients who have donor advised funds or an interest in impact. Using CapShift's web-based tools, you and your client can build a customized portfolio of impact investments tailored to their unique needs.

What are the benefits of working with CapShift?

- Access an actively managed database of public and private impact investing opportunities sourced from leading partners.
- Attract and engage new clients with a differentiated, value-add service.
- Demonstrate leadership with new investment tools for increasing measurable impact.
- Leverage customized Salesforce-based tools to streamline investment collateral and reporting.

Who is CapShift designed for?

Advisors with clients who are interested in:

- Catalytic philanthropy
- Impact investing - both new & experienced
- Flexibility to propose their own impactful investment ideas for their account
- Private funds and direct investments
- Low fees and tax efficiency

ABOUT CAPSHIFT

CapShift offers a turnkey impact investing solution that empowers donor advised fund sponsors and their donors to discover, execute, and monitor curated impact investments.

How do I work with CapShift?

Fidelity Charitable

Introducing CapShift: A New Impact Investing Tool

Fidelity Charitable is inviting donors with Giving Accounts over \$500,000 to obtain free access to CapShift, including a diverse set of pre-approved impact investment and recoverable grant options across asset classes

Renaissance Charitable Foundation

An Impact-Enabled DAF Powered by CapShift

RCF is a \$2 billion DAF provider that has partnered with CapShift to allow donors the flexibility to propose their own impact investment portfolios, including direct investments into companies, with fees equal or lower to major providers.

Work With Your Current DAF Sponsor

Increase Your DAF Clients' Impact Investing Flexibility

We are flexible and work with other DAFs, and are expanding to more billion-dollar clients this year. Email Adam to let us know where you and your clients prefer to work and we'll help make it happen.

Email Scott Nance at snance@capshift.com to start a conversation about how we can help you.

www.capshift.com