



MOBILIZE CAPITAL FOR PURPOSE

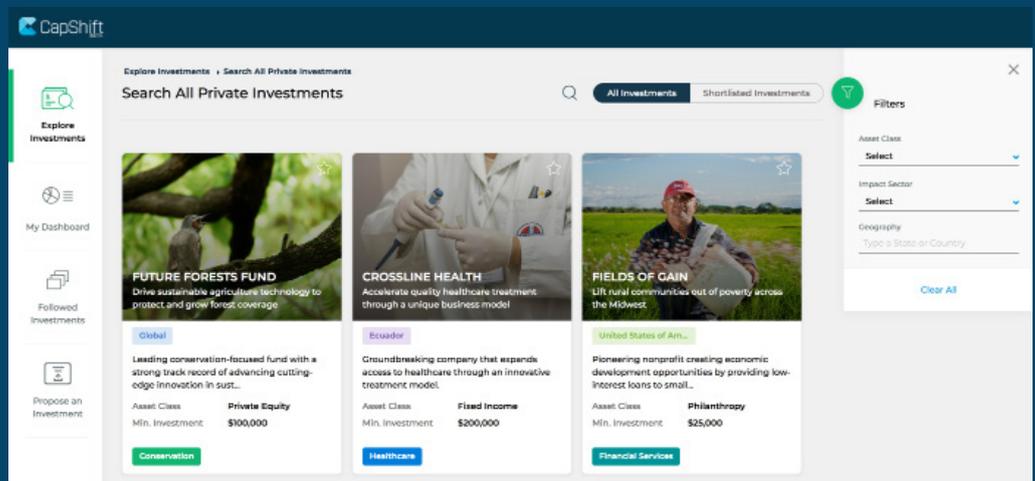
ABOUT US

CapShift is a turnkey impact investment solution for donor advised fund sponsors. With CapShift, donors and their advisors discover and invest in private and public companies and funds that address large global challenges.

Investors in CapShift include the Heron Foundation, Omidyar Network, and other leading community development financial institutions (CDFIs) along with pioneering impact investing families. CapShift was founded by Jacques Perold, former President, Fidelity Management & Research Co., and MissionPoint Partners, a leading impact investing advisor and asset manager.



Partner with CapShift to bring the next generation of philanthropic tools to your donors.



Investment opportunities are for demonstration purposes only

Make Impact Investing Simple for You and Your Donors

How it Works

CapShift provides an out-of-the-box solution that makes it easy for you to offer quality and liquid impact investment opportunities to your donors.

Demand for impact investment products is growing—47% of millennial and Gen X donors are interested in making an impact investment with their charitable dollars.

Donor advised fund sponsors face a number of challenges in prudently meeting this demand, including sourcing, investment oversight, donor communication, and reporting requirements.

CapShift helps you overcome these challenges to deliver a value-add impact investing service to your donors. If you're interested in partnering with CapShift, please email partners@capshift.com.

Benefits of Partnering with CapShift

Our services are tailored to help you meet your donors' diverse and increasing impact investing needs. These include...

- 1 Custom menu development** of public and private impact investments screened by CapShift against your investment criteria and sourced from leading experts
- 2 Donor engagement tool** built on Salesforce that allows donors to select the investments that meet their risk, return, liquidity, and impact objectives
- 3 Administrative tools** that facilitate donor recommendations and provide access to the donors' financial advisor and your staff
- 4 Reporting** available through the web platform that can be integrated with your existing systems

