

# ACCELERATE YOUR FUNDRAISING WITH MISSION-DRIVEN CAPITAL

Interested in raising capital from the \$1 trillion charitable investment market more efficiently and at no additional cost?

CapShift can help. We are an impact investing platform that helps philanthropic and financial institutions — and their clients — use their charitable capital to fund solutions to environmental and social challenges. Our clients include over two-thirds of the donor advised fund market by assets, as well as leading foundations, financial advisors, and family offices. Many of these individuals, families, and organizations are seeking new impact investment opportunities that align with the issues and geographies they care about.

We can help you access these potential funders in **two easy steps**.

## STEP ONE: JOIN CAPSHIFT'S PLATFORM - IT'S FREE!



**Share the details of your opportunity and offering documents** (if applicable). If we are interested, we will explain how to submit your opportunity to our team for additional review. Once approved for our platform, your opportunity will be available to our network of clients.



**If our clients are interested in funding your opportunity**, we will reach out to conduct additional due diligence on financial, operational, and impact considerations as well as coordinate the details of the transaction.

## TYPES OF OPPORTUNITIES WE WILL CONSIDER\*

- **Private, public, and direct** investment opportunities transactable in the U.S. with clear impact alignment.
- **Recoverable grants** which support nonprofit programs and activities that have the potential to generate revenue.

*\*For private or direct opportunities, a target fundraising of over \$1 million with a fundraising timeline of 3-9 months. We will also consider opportunities with a full spectrum of return profiles including those seeking a return of capital, concessionary, and market-rate returns.*

## WHAT'S A RECOVERABLE GRANT?

Recoverable grants are grants that enable nonprofits to take in immediate, flexible, and high impact funding from donors. Funding gets recycled back to donors if the nonprofit meets its predetermined goals. In the event the goals of the recoverable grant are not met, no funds are recovered by the donor — the money remains with you as a grant.

## STEP TWO: TAP INTO CHARITABLE INVESTMENTS THROUGH YOUR OWN FUNDRAISING NETWORK

CapShift can also help you activate charitable assets held by families or foundations in your own network.

### Donor advised fund / foundation



- Introduce the donor and / or their advisor to CapShift
- We'll diligence your opportunity for their institution
- We'll help facilitate the transaction through the existing donor advised fund\* or foundation

*\*where the opportunity meets an institution's investment or programmatic guidelines*

### Donors interested in establishing a donor advised fund



- Introduce the donor and / or their advisor to CapShift
- We'll help them find the right donor advised fund platform to support their philanthropic goals
- We'll work with their newly chosen provider to diligence your opportunity
- We'll help facilitate the transaction through the newly established donor advised fund

## ABOUT CAPSHIFT



CapShift is a leading impact investing platform whose mission is to put philanthropic capital to work for communities and the planet. We do this by providing rigorously researched, easy to access, and cost-effective impact investing and recoverable grant opportunities to donor advised fund holders, family offices, and foundations.

Visit **[www.capshift.com](https://www.capshift.com)** to learn more about us and the capital that we have mobilized for purpose to date.

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