CapShift®

Build Your Practice With Impact Investing

Increasingly, clients expect their financial advisors to support their values as well as their financial goals. CapShift's impact investing platform can help you retain, delight, and attract new clients by enabling you to provide efficient access to portfolios personalized to your clients' priorities.

Impact solutions to meet your client's goals

Impact research platform

Remove the complexity involved in building and managing custom impact portfolios to meet specialized client requests. We work with you and where requested, your clients, to develop an impact investing mandate, construct a portfolio from pre-diligenced managers, and provide ongoing monitoring and financial & impact reporting that integrates with your systems.

Impact sub-advisory services

Provide your team with a cost-effective way to source, diligence, and gain expertise on the full impact opportunity landscape. Our platform covers over 2,230 public, private, and nonprofit funds covering major themes such as climate change, income inequality, racial equity, community investing, and more. You can use our platform to find opportunities for individual clients or build an offering line up specific to your practice. This is a great way to meet growing client demand for impact investing without adding additional staff to your team.

Donor advised fund (DAF) solutions

Unlock impact investing options within your clients' charitable assets. If your client already has a DAF, we can work with them to incorporate impact investments aligned with their philanthropic goals. If your client wants to set up a DAF, our FlexDAF® for Impact solution offers impact investing options aligned with your clients' values. We have strategic relationships with national, regional, and local donor advised fund providers, such as Vanguard Charitable, Morgan Stanley GIFT, Fidelity Charitable, National Philanthropic Trust, and others. Our clients collectively manage over $70 billion, representing over half of U.S. donor advised fund assets.

Our business is built to support yours

We are B2B technology-enabled advisory platform that doesn't offer financial planning or broader wealth management services directly to families. We aim to be an extension of your team –allowing you to tap into our deep impact investing expertise when and how it makes sense for your practice.

Ready to start a conversation about how we can help you retain, delight, and attract new clients?

Email hello@capshift.com to start a conversation about how we can help you.

ABOUT CAPSHIFT

CapShift's impact investing platform and suite of solutions empower financial and philanthropic institutions, and their clients, to invest in their vision for a better tomorrow. 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** to learn more about us and the capital that we have mobilized for purpose to date.

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