

# Activate Your Money: Impact Investing 101

## Introduction

This is a five-module introductory course based on Janine Firpo's new book, *Activate Your Money: Invest to Grow Your Wealth and Build a Better World* (Wiley, May 2021).

A pilot on-line version of the course will be offered in the Spring of 2021, co-sponsored by the Seattle Impact Investing Group (SIIG), Seattle Social Venture Partners (SVP), and Invest for Better. Sessions will be offered biweekly on Wednesday late afternoons, 4:00-5:30 p.m. Pacific, beginning May 5. Cost of the course is \$500 PLUS a commitment to redirect a personally meaningful portion of your investment portfolio in the direction of impact.

The goal of this course sequence is to not only learn about impact investing, but to begin actually moving your money in a more values-aligned direction. Because this goal is action-oriented, this course may require more of a personal and financial commitment than other introductory courses. If you're serious about moving your money, these commitments will help you achieve your goals.

## Philosophy

Our core belief is that ALL investing is Impact Investing.

That is, we believe that any deployment of capital has an impact in the world, for good or for ill. The impact may be large or small, intended or unintended, but whenever financial resources are brought to bear in one way rather than another, they have an impact in the world. For this reason, we have chosen to use the language of "values-aligned investing" in this course to reflect a conscious set of choices to invest money in ways that help to create the world you wish to help bring into existence.

Our second core belief is pedagogical. We strongly believe in the power of peer learning and support. It's more effective, it holds people accountable, and it's way more fun. Thus, we've built the course on a cohort model of 15-20 people, with permanent breakout groups of about 5 – groups that we hope will continue to meet and support one another long after the course is done.

Finally, we believe in the democratization of values-aligned investing. We believe that everyone should be able to align their investments with their values – whether their assets are simply cash in a checking account or a multi-million-dollar fortune in the capital markets. We plan to address both ends of the spectrum through future course offerings based on Janine's book.

## Instructors

Co-instructors for the pilot course are Jill Bamburg and Nancy Reid, both of whom have served as moderators of the Seattle Impact Investing Group (SIIG), one of the co-sponsors of the course.

**Jill Bamburg** is the current moderator of the Seattle Impact Investing Group (SIIG). She was previously a co-founder, administrator and faculty member at the Bainbridge Graduate Institute (BGI), the first US institution to offer an MBA in Sustainable Business. She is the author of *Getting to Scale: Growing Your Business without Selling Out* (Berrett-Koehler, 2006). Jill holds a BA in English from Washington University and an MBA from Stanford.

**Nancy Reid** is a counselor specializing in the individual, family, and social effects of money. Since 2007, she has advised investors who seek coherence in their resource allocation decisions. Most recently she launched and chaired the Seattle chapter of Tiger 21, a peer membership and learning network focused on wealth creation, legacy, and family dynamics. Her investment advisory career began at Lehman Brothers and Barclays Wealth Americas, and has since expanded to include a specialization in impact investing, with leadership roles at [Canopy](#), [EnVest](#), and Seattle Impact Investing Group. Her consulting practice, [Tyche Consulting Services](#), helps investors create investment policy statements that reflect what they love and harness their power to influence the future. She holds a BA from Yale University, an MBA from the Tuck School of Business, and a Grand Diplome from the French Culinary Institute. She holds a CTFA (Certified Trust and Financial Advisor) designation from the American Bankers Association.

## Course Content

*Activate Your Money: Impact Investing 101* is based on the first three chapters of Janine's book, supported by a myriad of other written, video and web resources. The topics covered are:

### **Values-aligned Investing: Step into Your Financial Power**

Understanding the power of values-aligned investing. Writing and sharing your personal Money Story.

### **Your Relationship with Money: Invest with Your Heart and Mind**

Learning about the UN Sustainable Development Goals (SDGs) as a framework for impact investing. Prioritizing the values you wish to support with your investment portfolio.

### **Your Financial Foundation: Risks, Returns, Requirements**

Learning the basics of reading financial statements, calculating your net worth and retirement requirements, understanding your risk tolerance.

### **Your Financial Foundation: Asset Classes and Asset Allocation**

Understanding the basics of asset classes and asset allocation. Learning how to evaluate both financial and impact performance. Reviewing your own asset allocation strategy -- past, present and future.

### **Your Financial Foundation: Your Investment Strategy and Next Steps**

Writing your personal Investment Policy Statement (IPS). Committing to next steps, both solo and with your small group.

## Follow-on Courses and Workshops

We are in the process of developing several follow-on courses and workshops to support the next steps in your impact investing journey.

*Activate Your Money: Impact Investing 201* will offer a deeper dive into impact opportunities in cash and the public markets, both debt and equity, based on chapters 4-8 in Janine's book. *Activate Your Money: Impact Investing 301*, primarily of interest to accredited investors, will offer a deeper look at private equity, debt and philanthropy, based on chapters 9-11.

In addition, we expect to offer at least three workshops: local investing, finding and managing a values-aligned financial advisor, and making impact investing opportunities available through employee retirement funds.

## Registration

To register for *Activate Your Money: Impact Investing 101*, please contact Jill Bamburg at [jill.bamburg@gmail.com](mailto:jill.bamburg@gmail.com). Send her an email briefly describing where you are in your impact investing journey, what you hope to accomplish through the course, and the major obstacle(s) currently standing in the way of activating your portfolio for impact. Based on these brief statements, we'll assemble a dynamic cohort that will help you actually ***move your money!***