

IMPACT INVESTING CERTIFICATE

Client demand for sustainable change is growing. We've designed the Impact Investing Certificate to enhance your expertise in this growing field. Are you a financial advisor, attorney, CPA, or philanthropic advisor who is new to impact investing or want to broaden your knowledge?

The curriculum moves from core concepts through real-world implementation. We explore the evolving market dynamics and regulatory considerations, empowering you to engage in informed discussions with clients about aligning investments with their values. Through case studies and tips from industry practitioners, you'll gain practical tools to help clients explore impact investing while maintaining focus on their financial objectives.

79% of investors agree they would be much more loyal to a financial advisor who actively helps them invest in a way that also has a positive impact on the world.

Source: Nuveen's 2021 Sixth Annual Responsible Investing Survey.

LEARNING OBJECTIVES

- Describe fundamental impact investing concepts, define key terms, and explain common investment vehicles used in the field.
- Analyze how impact investing can complement and enhance philanthropic strategies, including examining the relationship between financial returns and social impact.
- Identify appropriate situations and opportunities to explore impact investing with clients.
- Address common client concerns about impact investing performance and measurement.
- Apply practical frameworks for incorporating impact investing considerations into existing client advisory relationships and investment strategies.

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The future of wealth management extends beyond financial returns. By deepening their expertise in impact investing, advisors can confidently help clients pursue opportunities that drive profit and purpose. It's about making this powerful approach accessible and actionable for everyone in the wealth advisory space.

-Allison Parker
Peake Impact



FACULTY

Allison Parker is the Principal of Peake Impact. She works directly with foundations ready to invest in constructive and crucial societal change. With 25 years of experience in the social impact sector, she excels at identifying investment opportunities that route capital to under-resourced communities where targeted investments can yield exponential results.

FEATURED INDUSTRY PRACTITIONERS



Sharon Schneider is the Founder and principal of Integrated Capital Strategies, LLC, and author of the “Handbook for an Integrated Life: A Practical Guide to Aligning Your Everyday Choices with Your Internal Compass.” She helps founders and family offices create positive social change using an expanded toolbox of resources and strategies that span the return spectrum from grants to market-rate investments.

Sayer Jones is Director of Occam Advisors and works with institutions to structure and measure the impacts of their investments. For 12 years, he led the regional impact investing practice at Meyer Memorial Trust in program-related and mission-related investment portfolios, deploying over \$50 million. Sayer has chaired city and state boards focused on impact investing and managing public portfolios for impact and has led investors in workshops to align social values with financial and cultural returns.

IMPACT INVESTING CERTIFICATE MODULES

- Fundamentals of Impact Investing
- Impact Across Asset Classes
- The Impact Investing Philanthropy Connection
- From Theory to Practice: Community Voice & Place-Based Solutions
- Impact Integrity: Due Diligence, Measurement, Ethics, and Professional Responsibility
- Impact Investing Through DAFs

COURSE FORMAT

Program Type: Certificate program - asynchronous course with module quizzes
Program Delivery: Readings, lectures, videos, graphics, downloadable advisor resources
Program Complexity Level: Intermediate

Daylight is an approved CE sponsor. Continuing education credits are eligible for completion of the Impact Investing Certificate.

CFP®, CPWA®, CIMA®, RMA®: 6.5 hours
CAP®, CFRE, CSPG^{CM}: 6.5 hours

Register for the [Impact Investing Certificate](#) or an [Annual Certificate Subscription](#) now!