



————— FIFTH ANNIVERSARY EDITION —————

INVESTING FOR GLOBAL IMPACT

2018



INDIVIDUALS, FAMILIES, FAMILY OFFICES & FOUNDATIONS



GLOBAL IMPACT SOLUTIONS TODAY

PARTNER AND LEAD SPONSOR



INVITATION TO PARTICIPATE

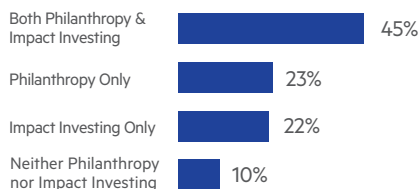
You are kindly invited to participate in "Investing for Global Impact 2018". This special Fifth Anniversary Edition will uncover the philanthropic and impact investing activities and attitudes of individuals, family offices and foundations.

Whether or not you are currently engaged in philanthropy and/or impact investing; whether you are a single individual or acting through a Single or Multi Family Office or a Foundation/Trust - your views are important to us!

With 246 participating individuals, family offices and foundations in 2017, Investing for Global Impact is the leading global study of philanthropy and impact investing in the family space.

SOME 2017 KEY FINDINGS

Are you active in Philanthropy and/or Impact Investing?



Base: All

75% of respondents stated that the financial performance of their impact investments met or exceeded expectations

88% of respondents stated that the social performance of their impact investments met or exceeded expectations

Families don't need to reinvent the wheel. They want to learn from each other. Families are long-term investors, they tend to have common values within families and are looking for opportunities to align their values and their money.

Justin Rockefeller
Investing for Global Impact 2017

Financial Times and GIST Initiatives in collaboration with Barclays are again partners in this annual, global research and report on philanthropy and impact investing.

It aims to provide a snapshot of current focus, trends and preferences, while revealing the opportunities for dialogue and partnership both amongst and between these groups.

BACKGROUND

Philanthropy and impact investing are two avenues that are potentially complementary and mutually reinforcing as a way to deploy resources to "deliver measurable positive social and environmental impact whilst also ensuring financial viability and sustainability".

While philanthropy amongst wealthy families has been a long established activity, impact investing is gaining a foothold as a driver of value for money as well as addressing critical needs that societies are facing such as the growing concentration of wealth, expansion of poverty, environmental damage and unsustainable economic development.

It is our contention that single individuals, family offices and foundations can play an important role in providing suitable responses and solutions as their investment strategies - aimed at capital preservation and cultivating strong ties with their communities - are very much in line with "impact goals" or simply put ensuring effective benefit for those in need whilst at the same time ensuring that reasonable

returns are possible and funds are used wisely.

As the chart at the foot of the page shows, the majority of our respondents make positive returns from investments that also provide a social return.

WHY PARTICIPATE?

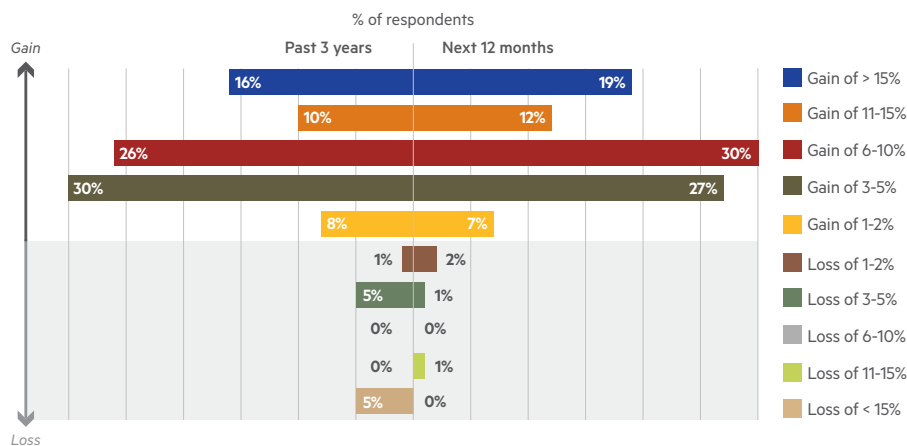
- The full report, complete with research results, will be made available (at no cost) to all participants
- The findings will help you to compare your individual approaches, and scope of investments against those of your peers
- Reaffirm and share findings regarding motivations towards and barriers limiting impact investing and philanthropy
- Financial Times Family Office Forums and other events planned around the publication of the report will enable better dialogue and new partnerships to be formed amongst the participants in the survey but also potentially with other actors invited on a selected basis

CASE STUDIES AND INTERVIEWS

In addition to the substantial quantitative research that this report is based upon, numerous high profile advocates and practitioners are interviewed in depth in each edition, to provide further insight and personal perspectives.

Past interviewees have included the Rockefeller family office, Kimbal Musk, and a case study on the joint venture between Johnson and Johnson and the Aga Khan Development Network.

Average annual financial returns from impact investment: achieved and expected



Base: All active in impact investing

YOU ARE INVITED TO TAKE OUR SURVEY NOW AT: www.gistltd.com

FOR MORE INFORMATION, AND COPIES OF PAST REPORTS, PLEASE CONTACT:

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