



Are You Ready for Impact Investing?

If you are a *family* or *foundation* committed to impact investing, you need the right partners to **turn your intentions into a clear action plan**. Godeke Consulting is that partner. Our team will work with you to establish specific and measurable goals, identify your readiness to proceed, clarify your strategy, and connect you to the right resources to successfully implement your plan. Along the way we are available to keep you on track and monitor the results.

We see two fundamental components of impact investor readiness:

- ***Creating a clear Impact Investment Statement; and***
- ***Connecting with the right partners and resources.***

Developing a clear Impact Investment Statement is critical for building consensus and clarity. Together we will work with you to align your vision and mission with your investing principles and values. We will then identify how to implement the strategy across all your assets. As your partner in crafting your Impact Investment Statement, Godeke Consulting can:

- Complete a governance and document review;
- Develop an interview protocol for staff, stakeholders and trustees;
- Conduct these interviews;
- Synthesize the interview results to produce a clear, concise Impact Investment Statement; and
- Prepare you to move forward.

Connecting your organization with the right partners and resources takes the right industry knowledge and relationships. Our team has been tracking impact investing capabilities within wealth advisors, registered investment advisors, OCIOs, investment consultants, banks, and multi-family offices for over 15 years. As your partner, this knowledge and expertise are available to you. We complete searches for new advisors and work with clients who simply want to learn about new options out in the market. During a search, Godeke Consulting can:

- Identify best fit advisors or consultants for you;
- Develop an in-depth, request for proposal (RFP);
- Narrow the pool of candidates using a customized evaluation tool;
- Conduct finalist interviews with you;
- Negotiate advisor service agreements and fees;
- Assist in onboarding the selected advisor or consultant; and
- Monitor their effectiveness.



Our team's approach will help you achieve results quickly and efficiently.

Why work with us? We lead you through an objective, thoughtful process that is customized to your specific needs while drawing on our experience and independence in the field of impact investing. Our engagements typically last 4 to 6 months, and we work on the basis of a project fee.

What is the difference between an Impact Investment Statement and a traditional Investment Policy Statement? An Impact Investment Statement is a guiding tool for both internal and external stakeholders that broadly defines your impact investment principles and strategies. An Investment Policy Statement establishes general investment objectives and criteria for asset allocation, risk tolerance, etc. Some investors design the Impact Investment Statement to operate at the board level and the Investment Policy Statement to govern the investment committee; others combine them into one document.

Who do we work with? Our typical client is a mission-driven family foundation with assets between \$20 and \$500 million committed to impact investing. They want to learn but also do. Our clients may not have the internal capacity needed to execute, and they see the value of working with outside experts. We typically are engaged by the board or the investment committee. We will be happy to provide you with a representative client list.

Contact Godeke Consulting at steve@godekeconsulting.com for a more in-depth discussion.

Godeke Consulting connects foundations, endowments and families to the right impact investing resources and partners.



STEVE GODEKE



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Our team brings together a deep understanding of financial markets and philanthropy with expertise in impact investment, organizational change management and strategy development. Our independence combined with our deep networks make us strong partners for you.

