





FROM PEER TO PEER

Peer-to-peer learning is a key feature of this Guide. It was made possible through collaboration with a broad range of HNWI and their teams worldwide, who have generously shared their approaches, successes, and lessons learned, as well as opening up their portfolios, in an effort to make the entry to impact investing less challenging for other private investors and philanthropists. These two pages provide a snapshot of conducted interviews and wealth holder case studies included in the Guide.

LEGEND:

The map, right, provides a regional split of interviews conducted. The big brown pins point out the number of people interviewed in a particular region. The placement of small pins indicates the country of origin of the wealth holders profiled in the case studies. In the cases of couples with different origins, only one pin is used (placed closest to their current location). The color of each pin corresponds to the part of the Guide where the case study is placed: pink – Part II; green – Part III; blue – Part IV.

At the bottom of the page is the case-studies index. In addition to the name of the HNWI, it indicates the Part of the Guide where the case study is placed (small pin, see color coding above), placement of impact investment activity (brown icons), the exact page number, and the country of origin. Names written in brown indicate persons who have also shared the details of their investment portfolios (from p.92). The placement of the impact investment activities is indicated by the following icons:

-  within FO or private wealth management
-  within family foundation
-  within family business
-  practicing impact investing as a career























































167 in-depth interviews with wealth holders conducted globally

45 case studies detailing motivations and strategies of HNW families

12 private impact investors opened up their investment portfolios



 	52	Almagor, Danny and Liberman, Berry	Australia	 	230	DOEN Foundation	Netherlands
  	160	Al-Muhaidib, Abdulhameed	Saudi Arabia	  	241	Elumelu, Tony	Nigeria
 	61	Alekperov, Vagit	Russia	 	76	Enthoven, Adrian	South Africa
  	152	Ayliffe, John and Cathy	Switzerland/UK	 	48	Epstein, Jim	US
 	83	Berbers, Veerle	Belgium	 	57	Esmée Fairbairn Foundation	UK
 	171	Bosch, Ise	Germany	 	45	FB. Heron Foundation	US
 	193	Brenninkmeijer, Stephen	Germany	 	221	Gandhi, Vikram	India
 	190	Chen, Annie	Hong Kong	  	209	Geldorp, Willemijn	Netherlands
 	74	Chong, Charles	Hong Kong	 	65	Godrej, Jamshyd	India
 	73	Chouinard, Yvon	US	 	188	Goldsmith, Ben	UK
  	58	Cordes, Ron, Marty, and Stephanie	US	 	216	Gonzalez, Rico and Nono	Philippines
				  	239	Jiwarajka, Sushill	India

 	63	Kazi Anis, Ahmed	Bangladesh	 	194	Rockefeller Foundation	US
 	184	Kleissner, Lisa and Charly	US/Austria	 	80	Rockefeller, Justin	US
  	49	Luhabe, Wendy	South Africa	  	163	Schwartz, Carol	Australia
  	70	Mahindra, Anand	India	  	75	Seibel, Alex	Brazil
 	203	Mailman, Josh	US	  	82	Steele, Paul	Australia
 	169	Mario Santo Domingo Foundation	Colombia	  	156	Stiefel, Lili	US
  	207	McKinnon, John	Australia	 	56	Stone, John	UK
 	81	Moraes Neto, Antonio	Brazil	  	157	Tabatznik, Seth	UK
 	244	Narula, Arvind	Thailand	 	153	van Beuningen, Frank and Margaret	Netherlands/US
  	176	Newell, Carol	Canada	  	154	van de Grijsparde, Huib	Netherlands
  	196	Omidyar, Pierre and Pam	US	  	166	Vardanyan, Ruben and Zonabend, Veronika	Armenia/Russia