



tools & resources

This part of the Guide provides a broad range of practical information on impact investing, including examples and resources, intended to serve the needs of readers looking for more detail on specific topics, discussed within the core parts of the Guide (Parts I–IV). This section differs from the Appendices, which provide practical information on venture/fund investing in general, helping the readers new to investing build the minimum knowledge base necessary to benefit from the core parts of the Guide. Tools & Resources is divided into four sections, based on the type of information provided. Each section is marked by the colored circle placed below the title of the resource.

UNDERSTANDING THE FIELD: This section provides examples of impact investments across asset classes and geographies, as well as an explanation of a layered structure and social impact bond.

PERFORMANCE OF IMPACT INVESTMENTS: While industry-wide data on the financial performance of impact investments are currently limited, the track record of more mature impact investment segments, as well as information on realized performance of impact investment products and portfolios, demonstrate that achieving both sets of returns (financial and impact) in the same investment is not fundamentally contradictory – it can be done. This section provides various data points that demonstrate that impact investments, if rigorously selected and professionally structured and managed, can meet the financial and impact objectives of investors.

PRACTITIONER TOOLS: For those readers who already practice impact investing, or are ready to take the plunge, this section provides additional practical information, examples, tools, and resources, aiming to help wealth holders develop or improve their impact investment programs.

WHAT ADVISERS SHOULD KNOW: This section is intended for advisers and wealth managers (WMs) interested in impact investing, as well as wealth holders who want to help their advisers get engaged in this area. The section explains the relevance of impact investing to WMs, highlighting the opportunities of engaging in the field and the risks of not doing so. It then proceeds to discuss some key considerations, from determining the implementation approach to integrating impact investing into the traditional portfolio-construction process.

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