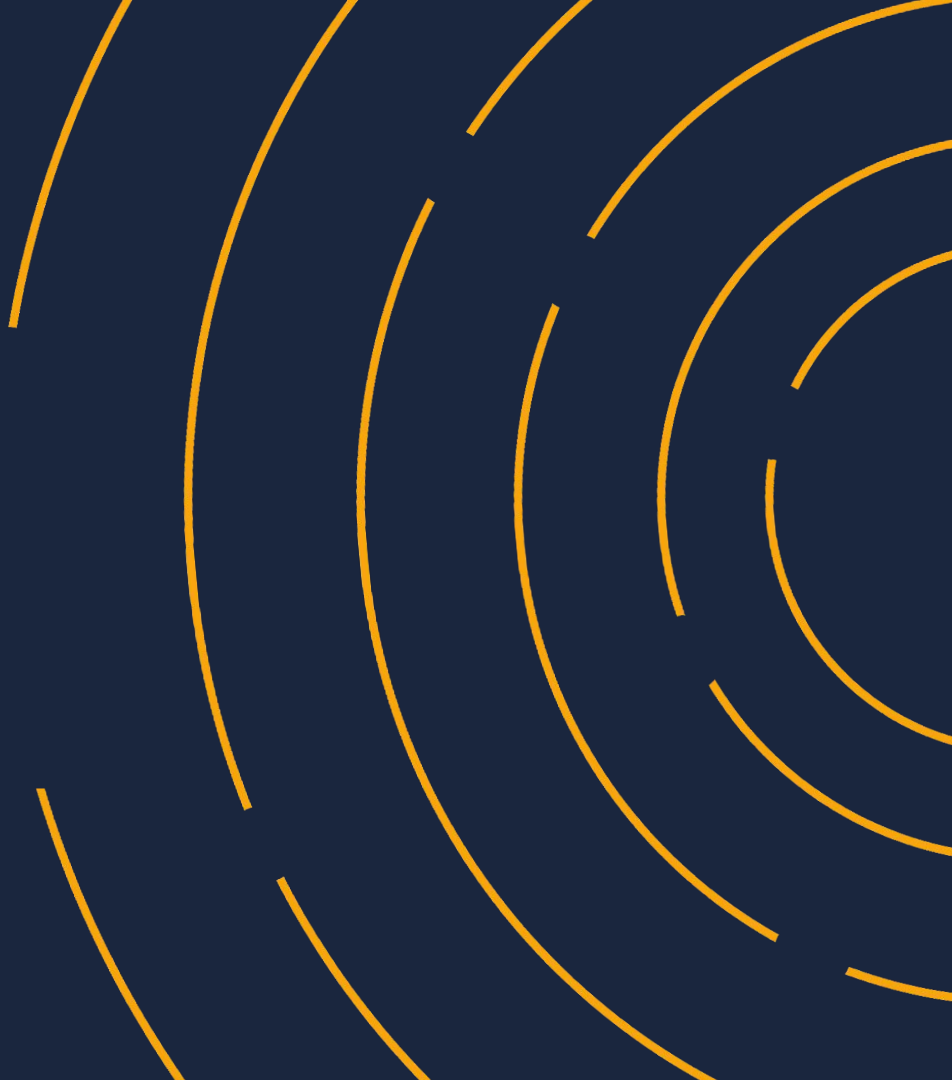


Membership overview



Welcome to The ImPact

The ImPact was founded in 2014 on a pact, a commitment among members to explore the impact of all their investments and invest to create measurable positive environmental and social change.

Our mission is to help families make more impact investments more effectively. Since 2014, our members have guided and supported each other in the alignment of their values with all sources of family capital.

Today, The ImPact connects a community of more than 90 families from 20 countries on five continents. We gather at global summits, regional convenings, dedicated working groups, and immersive field trips. **Together, we are working for a world in which it is easy for families to align their assets with their values and invest for deep, enduring impact.**

The ImPact

Leaders Forum Mexico City 2023:
Strategy & Vision Workshop 2030



United by purpose. Driven by action.

Connection

Members help each other take bold actions whose impact ripples far beyond the edges of our community. Deep relationships are the heart of our community – relationships that make it safe for members to experiment, admit failure, and iterate together.

Curiosity

We are a multi-generational community whose members gather to inspire and support one another by openly sharing new ideas, challenging questions, and impactful investments. Courageous conversations create mutual accountability and catalyze transformative collaboration.

Commitment

Members of The ImPact demonstrate their values through their investments. Each person's values are unique, but our members share the joy of learning with humility, exploring new and challenging ideas, and collaborating to improve the impact of their investments in the world.

Move from intention to action.

The ImPact is a growing, ever-evolving community where members shape the conversations, strategies, and collaborations that inspire and drive the impact they want to see in the world.

Community – Connection

- 90+ families & family offices across five continents
- Global, regional and thematic events
- Field trips & learning experiences
- 1:1 Community Manager support
- Curated peer-connections
- Member WhatsApp groups
- Monthly newsletter
- Weekly events bulletin

Education – Curiosity

- 10 Key actions curriculum
- Learning to action series
- Member resource portal
- Working Groups
 - Innovative Finance
 - Operationalizing Impact
 - Creative Economy
 - Regenerative Food Systems
 - Mental Health

Lab – Commitment

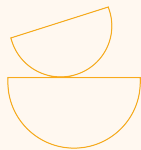
Our members have collaboratively incubated:

- [Trimtab Impact](#) (impact-first investing)
- [TransCap](#) (Systemic Investing)
- [Ownership Capital Lab](#) (Employee Ownership)
- [Innovative Finance Initiative](#)
- + Emerging member-initiated projects

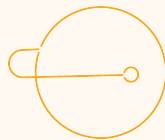
Activate change: Sample 1st year membership



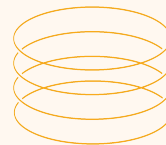
- Receive your bespoke '10 Key actions' member plan
- Understand your wealth management system
- Map the impact of assets in your portfolio
- Meet your peers and and explore community resources



- Attend the Strategy Summit for investment decision makers (April)
- Join a working group e.g. Innovative Finance
- Start writing your investment policy statement for impact



- Explore and learn on one of our field trips to the Amazon, Patagonia or wherever our community's impact can be felt
- Work with an advisor on redesigning your wealth structure
- Attend the Next Gen Retreat



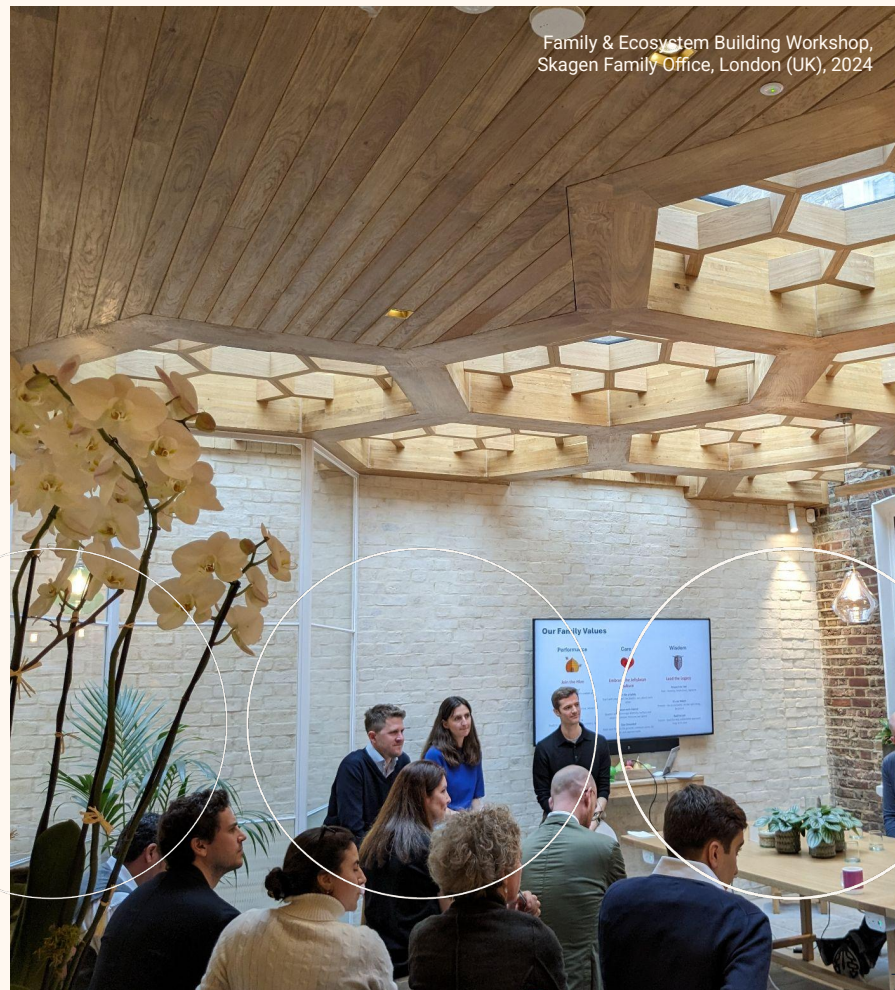
- Attend the Leaders Forum for family principals (October)
- Explore how to drive systems change through one of our ImPact Lab initiatives



Transformation from connection

“The community continually elevates and refines our family’s work. It has opened our eyes to innovative ways of thinking and our hearts to ways of being that challenge, excite, and inspire us. What we do is now far more impactful than anything that our team could have achieved alone”

ImPact Member since 2023



Family & Ecosystem Building Workshop,
Skagen Family Office, London (UK), 2024

Meet your peers: Global convenings



Transformation happens when members come together, building deep connections, exploring new ideas, and committing to action. Our convenings provide spaces for meaningful dialogue and peer-driven insights.

Strategy Summit (every April)

Operationalizing impact: A space for investment decision makers within families/family offices to talk about strategies to put impact strategies into action.

Miami (US), 28 April - May 1 2025 | Agenda [here](#) & Key takeaways [here](#)

Oxford (UK), 23-26 April 2024 | Agenda [here](#) & Key takeaways [here](#)

New York (US), 25-27 April 2023 | Agenda & Key takeaways [here](#)

Leaders Forum (every October)

Reimagining impact: A space for family principals to reimagine their impact and explore their family systems - Note: Family Principals only

Lisbon (Portugal), 7-10 October 2025 | Save the date!

Greater New York Area (US), 8-11 October 2024 | Key takeaways [here](#)!

Mexico City (Mexico), 3-6 October 2023 | 'Impact in a Time of Transition': Key takeaways [here](#)





Experience solutions: Join an immersion

From learning about regenerative agriculture on one of our members' farms in Louisville, to exploring climate and biodiversity challenges in Patagonia, to meeting indigenous communities in the Amazon, to understanding how to solve for social challenges in communities during our Heart & Soul trip to Detroit - join one of our immersions, field-trips or learning programs and see first-hand how others have taken action.



WhatsApp groups

Ask questions, share ideas, discuss opportunities directly with other family principals through moderated WhatsApp groups.



Member booklet

Find peers from around the globe that are solving for the same challenges as you investing in similar verticals or with similar profiles.



Newsletter & Bulletin

Stay up to date about the latest information about our community, upcoming activities and the ecosystem.

Curated connections: Find like-minded families from around the world

As a peer community focused on moving from intention to action, we actively connect members to help them get “unstuck.” We curate connections to other members facing similar challenges - from getting family buy in, to communicating impact goals with advisors, to defining and measuring impact.





Transformation from curiosity

“By learning from peers and tapping into collective knowledge, I’ve been able to align my efforts with a broader vision—leveraging capital and relationships to drive systemic change and create a more sustainable and equitable future”

ImPact Member since 2023



Guided exploration & learning: 10 Key Actions Framework & Curriculum

For over 10 years, we have guided and supported families in the alignment of their values with all sources of family capital - philanthropic, investment, and family-owned businesses. In doing so, we have developed our **10 Key Actions Framework**, a step-by-step playbook capturing lessons learned from families when developing, implementing, and refining their impact investment strategies. Find out more [here](#).

Define your
“guiding lights”

Achieve family
buy-In

Build an investment
team

Create an IPS
for Impact

Map the impact
of your Assets

Weave impact
into due
diligence

Find and make
impact investments

Measure & manage
impact

Engage institutions

Give back to
“Impact
ecosystem”

Learning to action series: Expert-supported learning initiative



In Q2 2024 we launched a Learning to Action series on **“Redesigning your Wealth Management System.”** In six sessions we explored how families can navigate the friction points of their existing wealth management system as they seek to align their assets with their values and invest in deep, enduring impact. Example sessions below:

Know thyself (3 Sessions)

Explored how families create a vision for their wealth while uncovering unconscious assumptions that may restrict more flexible and impactful investments. We identify multiple family wealth archetypes and considered the role that wealth plays in sustaining or fracturing family relationships.

How good are your guides?

Two experts and family members shared stories about common mistakes families make when hiring and working with wealth managers and advisors.

Fiduciary duty

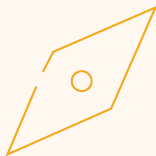
Two attorneys running impact-focused practices discussed the evolving legal interpretations of fiduciary duty and why it is such a powerful lever for systemic change.

Creating trusts

Two trust attorneys described the role of design choices and tradeoffs as families create family trusts and work within trust structures to develop more impactful investing.

Courageous conversations: Member Working Groups

We know that creating real impact requires fresh perspectives and bold new approaches. In 2023, we launched The ImPact Working Groups, **member-led groups that have emerged around themes of shared interests** and sustained member engagement. These small-group exchanges provide a space to collaborate, share insights, challenge conventions, reimagine investment strategies, and embrace innovation



Regenerative Food Systems

Connects members advancing regenerative agriculture and food systems and supports collaboration to accelerate the systems transition. Combines virtual sessions, in-person immersions, and peer learning.



Operationalizing Impact

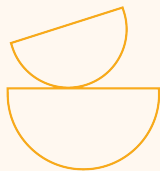
Executives and family principals in operational roles come together to share insights, learn from one another, and support each other through peer consultation.



Innovative Finance

Explores emerging financial tools for funding impact. Members share strategies and case studies to activate capital that strategically prioritizes impact and systems change.

“Member Working Groups” (Part II)



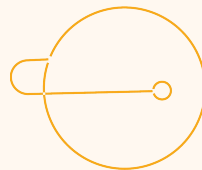
Women in Impact

A safe space for female wealth owners to connect, it covers gender lens investing, leadership, and family dynamics. Empowers women to align values and assets for impact.



Creative Economy

Brings together members exploring impact in fashion, art, media, and storytelling. It explores different approaches to investing in the creative industry.



Health/Mental Health

Brings together members interested in advancing impact in healthcare. Offers a space for open dialogue on mental health and wellbeing, encourages reflection, and collective learning.

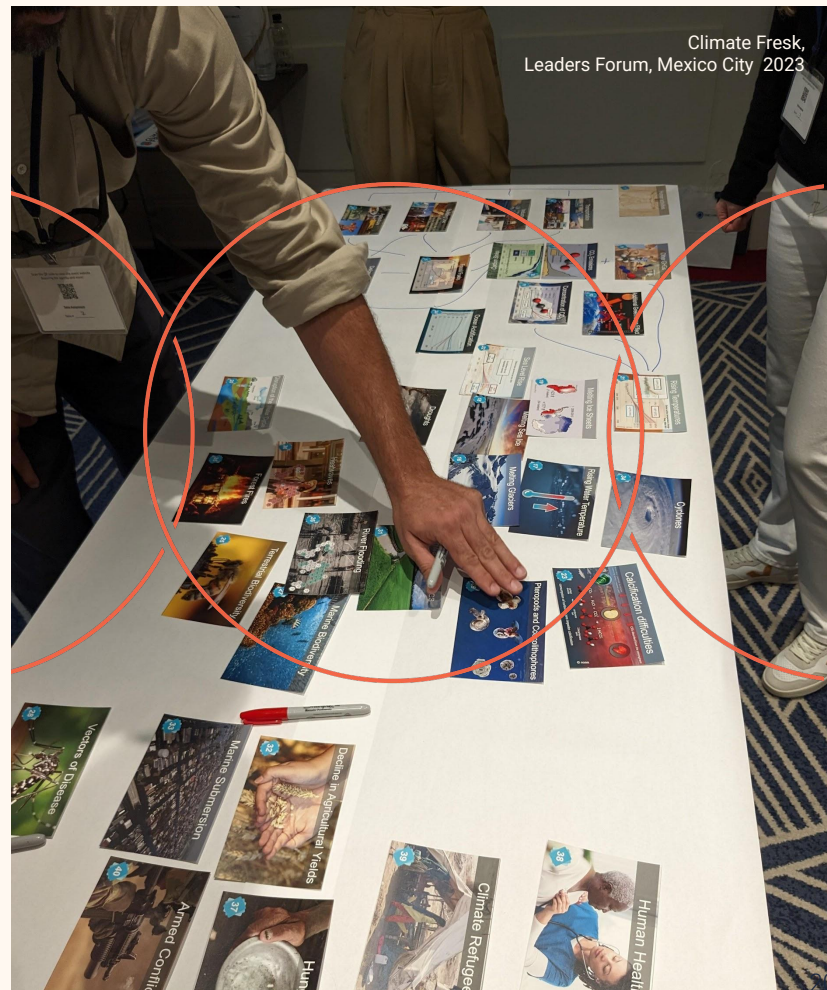


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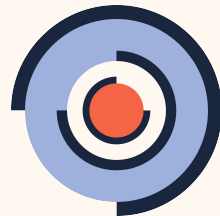
Transformation from commitment

“Through the Lab, we built something together that is so much more than what we could have created in our silos. And we actually followed through thanks to The ImPact, who kept us on track.”

ImPact Member since 2017



The ImPact Lab



The ImPact Lab is a space for research and co-creation of innovative, impact-driven initiatives. It leverages the collaborative energy of The ImPact's network to enable the envisioning, design, development, and launch of impact investment experiments that are unlikely to otherwise occur. Lab projects come in many shapes, sizes, and forms, but they all address significant gaps in local, regional, or global impact investment markets and ecosystems. They push on significant points of leverage of the financial system and are designed to have impact beyond themselves. Lab initiatives play with ideas, structures, practices, or stakeholder groups that are new or unproven in the market in which the project exists.

Research & Thought Leadership

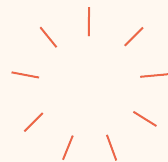
Exploring and studying structures, methods, and practices emerging on the frontiers of impact finance

Co-Creation

Supporting members to develop bold visions for new initiatives. Collaboratively building and guiding projects from concept to prototype to launch.

Lab initiatives

Lab initiatives may be research projects, timebound networks or campaigns, investment vehicles, or new standalone organizations. Or other things we can't imagine yet! These are a few of the current Lab projects in progress.



Transformation Capital Initiative

TransCap works to build the field of systemic investing—a new investment logic for funding systems transformation. We are running an open innovation space for developing, testing, and scaling systemic investing through research, prototyping, and field building. (Launched in 2022)



Trimtab Impact

Trimtab is an unapologetically impact-first financial institution. Trimtab invests across asset classes and sectors in search of the highest impact additionality. It is an independent entity incubated by The ImPact and Blue Haven Initiative, sponsored by a coalition of family offices. (Launched in 2024)

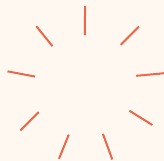


Ownership Capital Lab

The Ownership Capital Lab focuses on capital as a growth and scale lever for employee ownership (EO) with a vision to grow capital to finance employee ownership. The Lab focuses on strategies for financing EO with capital to address structural inequality in the U.S. (Launched in 2025)

Lab initiatives

Innovation / Ecosystem Building



Innovative Finance Initiative

A 5-year initiative to accelerate the adoption of innovative finance models that work - and build those still needed. (Launched in 2025)

Research



Impact Linked Compensation

The largest study to date on the fund managers (GPs) who use impact linked compensation, and the limited partners (LPs) who invest in them. The report provides a comprehensive guide for understanding ILC within the intricate dynamics of fund structures, portfolio compositions, and relationships with asset owners. (Completed in 2024)



Choose your path to transformation

Steps to join The ImPact

01

Membership application

- Introductory call with regional director or the executive team
- Introduction to 2 member families
- (Optional) Attend an ImPact event
- Invitation sent through our Board Chair

02

Membership contribution

Membership provides one year of full participation in The ImPact for all members of the family as well as internal executives that support the family office/family foundations*. Membership includes access to both global annual events and all regional events and immersions. Annual membership dues: 25k USD.

About us

The ImPact is a not-for-profit organization, registered in the US. Our operations are entirely funded through members' contributions as well as grants/donations from families keen to support the work of our organization or specific projects we incubate.

For transparency, we share with our members how and where we spend membership contributions and grants.

*Note: The annual Leaders Forum is open only to family members



Appendix



Justin Rockefeller

Co-Founder of The ImPact
Chair of the Board



Josh Cohen

Co-Founder of The ImPact



Liesel Pritzer Simmons

Co-Founder of The ImPact



Julie Engelhorn

Trailblazers for Impact Meet our Board



Rogerio Rabelo



June Nagao



Jessica Droste - Yagan



Michael Trager-Kusman



Aunnie Patton-Power

ImPact Fellow



Claudia Coppenolle

Director of Europe



Chris Prottas

Director of
Operations



Gabriela Angel

Associate



Kiara Jacoby

Global Experiences
Manager



Kristi Kuechler

Senior Director



Liliana Manns

Director of Community &
Latin America

Activators for Impact: Meet our Team



Linda Rincon

Director of Experiences



Pearlline Yum

Director of Asia



Sydney Bolger

Director of US & Canada



Sam Bonsey

Executive Director



Tawana Lovick-McDaniel

Operations Manager



Trace Welch

Director of Special Initiatives

