



ENDOWMENTS FOR IMPACT

GoodWolf is collaborating with experts at Brightlight and Milner+Huang to offer Directors, Trustees and Senior Management of Queensland trusts, foundations and other for-purpose organisations managing endowments or investments, the opportunity to learn how to align their organisation's capital with its purpose and impact.

Through two workshops, we are offering those entrusted with either fiduciary or executive responsibility of purpose driven organisations the opportunity to journey with us and their peers towards applying their capital to create impact through both investment and granting activities.

Rationale

At present, the weight of Australia and New Zealand's +\$50bn of trust, foundation capital sits predominantly across 'traditional investing' approaches with few, if any, screens used to avoid those investments that might create harm and typically no engagement around underlying assets deployed beyond their passive investment.

Sustainable Development Goals and our twin crises of Climate and Biodiversity require the trust and foundation's sector, whose purpose is benevolent/beneficial, to more actively engage in the opportunities to transition its underlying capital towards responsible and ethical investment practice and to apply an impact framework across their investment strategy.

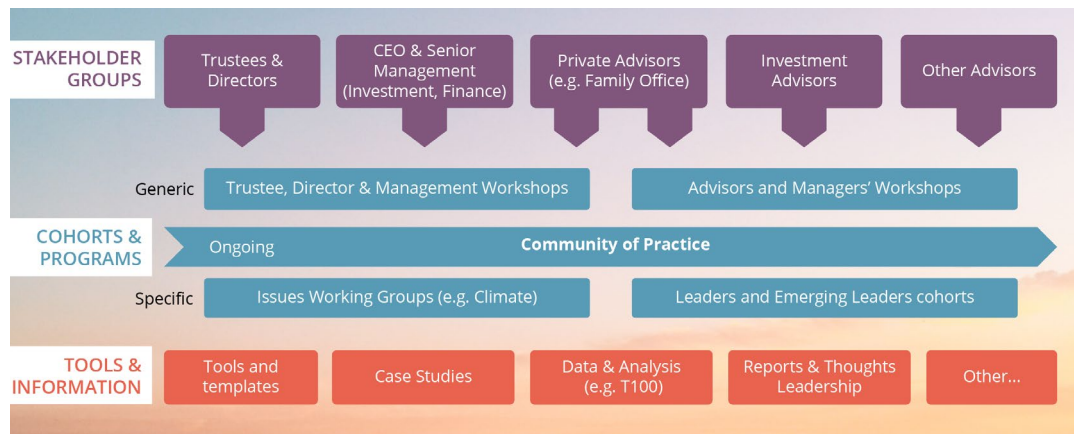
However, the practical steps to make a transition and how to adjudicate and monitor 'impact' remain obscure and confusing.

Through our workshops, we unpack the structure, language, frameworks and dispel the myths to provide practical insights, build consensus and the steps forward to enable the transition.

*This workshop series was piloted and then run in Victoria and New South Wales with strong positive feedback, and we are now making this opportunity available to groups in Queensland.

Endowments For Impact: Building The Ecosystem

Transitioning endowments and investments requires an ecosystem of knowledge, learning and support sustained over a period of time to accompany the journey purpose driven organisations are taking, and linking in the key stakeholders responsible for effecting and implementing the transition.



Workshop Overview

This two-part workshop series is for Trustees, Directors, Investment Committee Members and Executives who are interested in unpacking the issues associated with a transition to impact and being equipped with tools in support.

The program includes (but is not limited to):

- Exploring pathways to address issues such as Persistent Dualism, Trust Governance, Investment Advisors, Prevailing Myths, Fiduciary Concerns, Market Maturity, Impact Reporting
- Key legal, fiduciary and commercial insights by expert advisors
- Model portfolio – using Brightlight’s model portfolio to understand what a model impact portfolio would look like based on your existing Investment Policy Statement
- Transition process support including unpacking the journey through responsible and sustainable investment towards greater impact as well as example Investment Policy Statements and tendering tools
- Case Study examples – unpacking their approach, process, progress and challenges

Communities of Practice

We build a Community of Practice around the workshops to allow for greater sharing of knowledge and experiences as the journey towards more impactful endowments and investments begins.

More information

For more information, please see our [website](#)

Who we are

For more information on who we are, please visit our websites

GOODWOLF PARTNERS

<https://goodwolf.com.au>

BRIGHTLIGHT

<https://www.brightlightimpact.com/>

MILNER+HUANG

<https://milnerhuang.com.au/>

Advisor Transitions

We are very cognisant that transitions by endowments and investments occur within a broader sector of support and engagement.

With this in mind, we are also running programs to advance the knowledge of investment advisors/managers, lawyers, accountants and tax advisors so that they can work effectively alongside purpose driven organisations as they make the transition to endowments for impact.

Workshop details

WHERE	Hand Heart Pocket Board Room, Level 1/826 Ann Street Fortitude Valley QLD 40063
WHEN	8 March & 21 March, 9am – 12.30pm
COST	(2 half day sessions with lunch) Net Assets of \$25m+ \$1,500 + GST Net Assets of <\$25m \$600 + GST

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