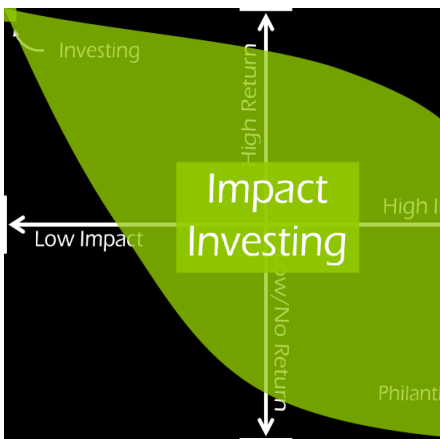


**Fordham Impact Investment  
Convening**  
**#ImpactFordham**

**WELCOME**

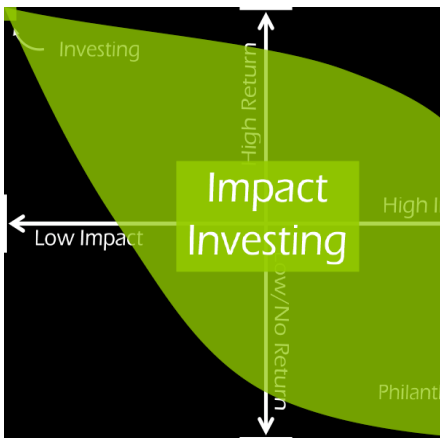
**Peter M. Lupoff**

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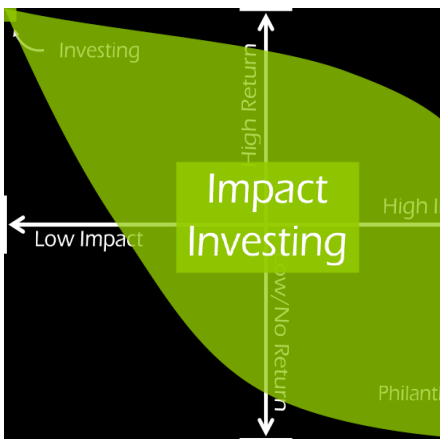


**What is Your Impact Investment Strategy?**  
**Establishing Missions and Goals, Impact Themes**  
**Targeting Problems, Targeting Geographies**

**Fordham University**  
**Lupoff Impact 3**

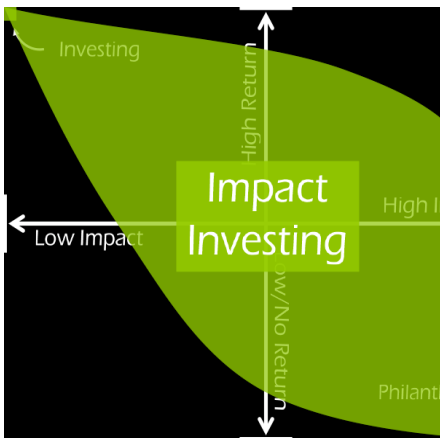


## Sourcing Impact Investments, Building Pipeline, Direct vs Impact Fund Allocation



## **Developing an Impact Investing Policy, Risk/Reward, Correlations, Diversification and Other Portfolio Construction Issues**

**Fordham University  
Lupoff Impact 6**



## **Impact Goal Focus – Gender and Race Equality/Inclusivity, Social Equity Investing**



**TIPC**  
TOTAL IMPACT  
PORTFOLIO CHALLENGE



**FORDHAM GRADUATE**  
**NET IMPACT** 

# Nationalism, Culture and the Risk of Future Free Riders, Failure of Global Partnerships



**Peter M. Lupoff**  
**November 26, 2019**

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FRIENDS AND FAMILY INTERESTS



# Historic Government-Sanctioned Tacit Bias In US Housing Markets, Wealth Creation Ramifications



**Peter M. Lupoff**  
**December 6, 2019**

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FRIENDS AND FAMILY INTERESTS

- **Does Human Need for Hope Damage the Prospect of Collaboration on Climate Change?**

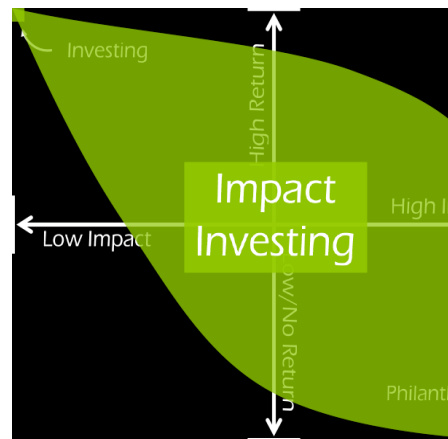
- **Is there a Correlation Between Traditional Investment Market Performance and Capital Allocated to Impact?**



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## Fordham Impact Investment Convening

Millennials are the Engine for Change  
(The Revolution will be Live)

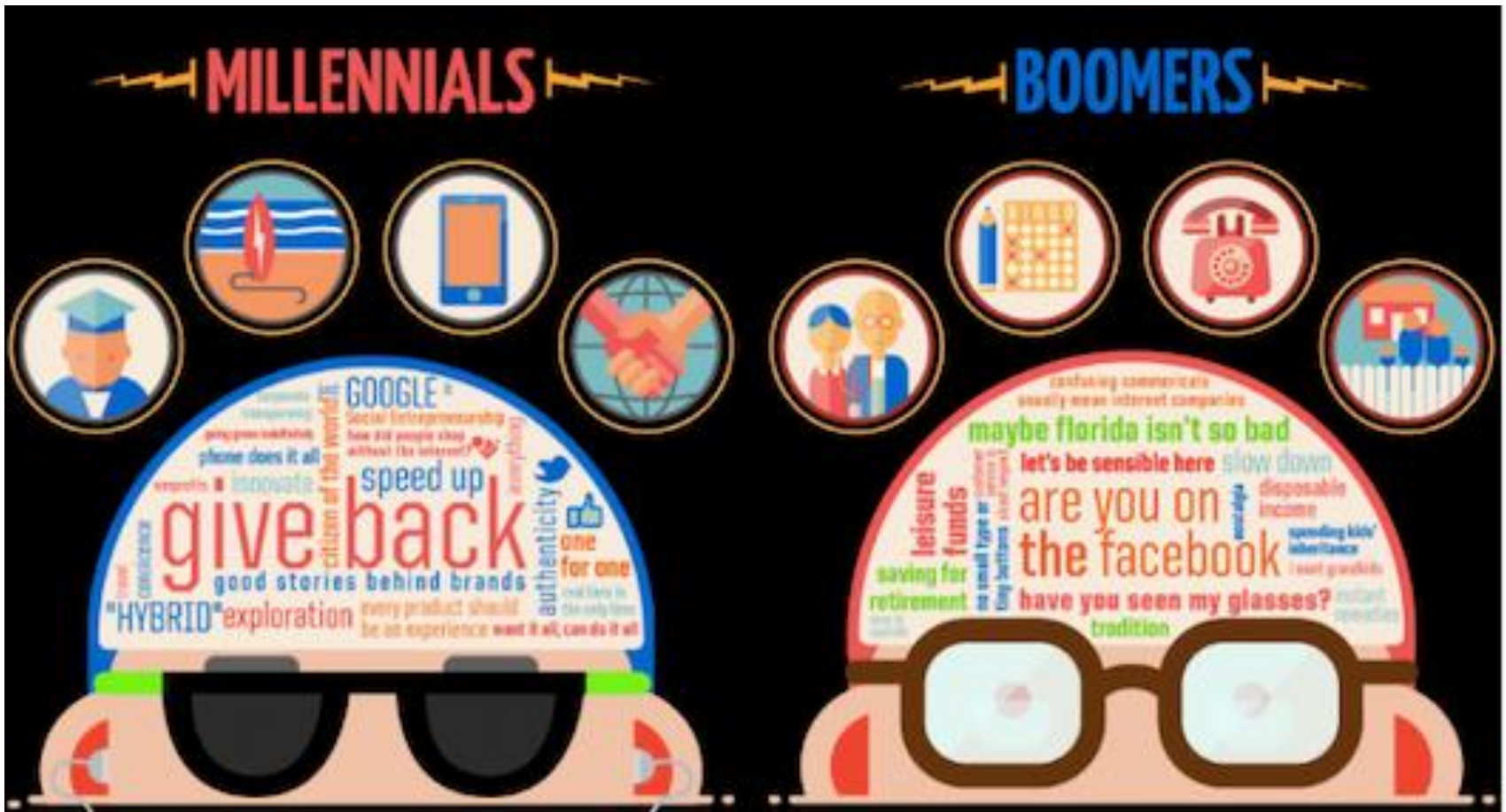
+ The Revolution will not be  
Televised



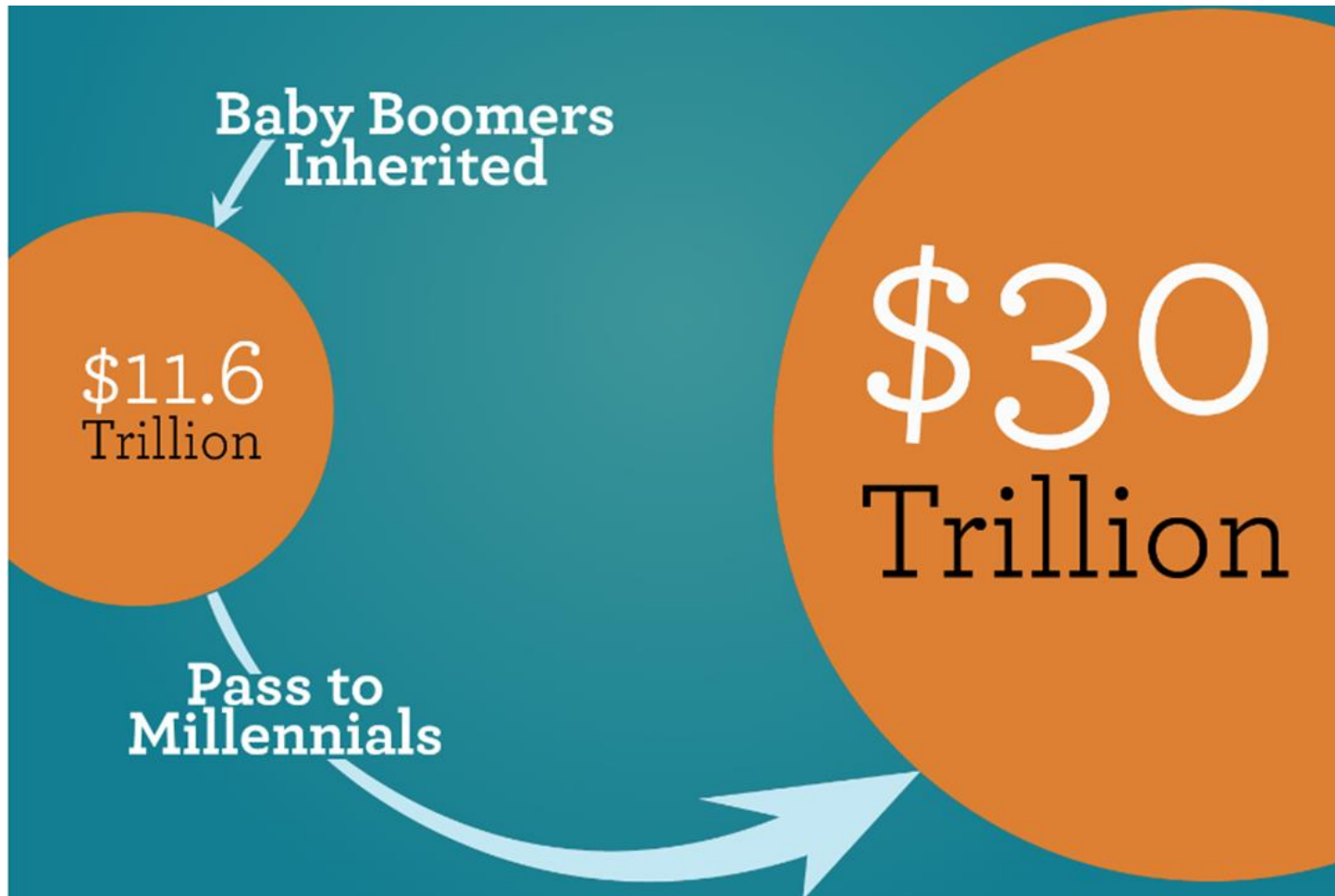
# + Millennials are Leading a Global System Change Revolution



# + Millennials vs Boomers



# + Generational Wealth-Transfer Drives Impact Investing into the Mainstream?

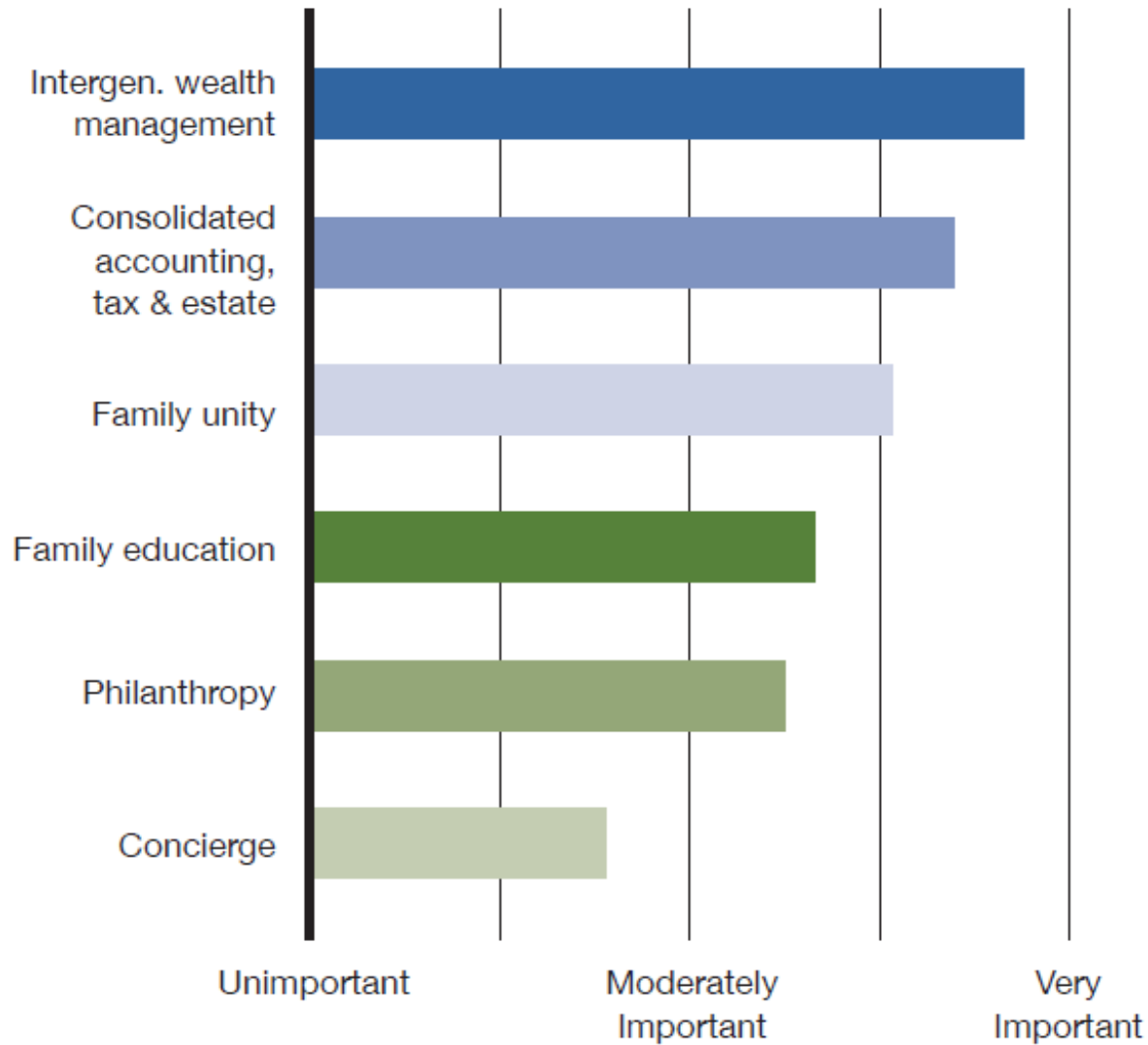




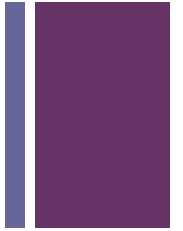
# + Family Office – A Vehicle for Investing with Goals of Legacy and Continuity



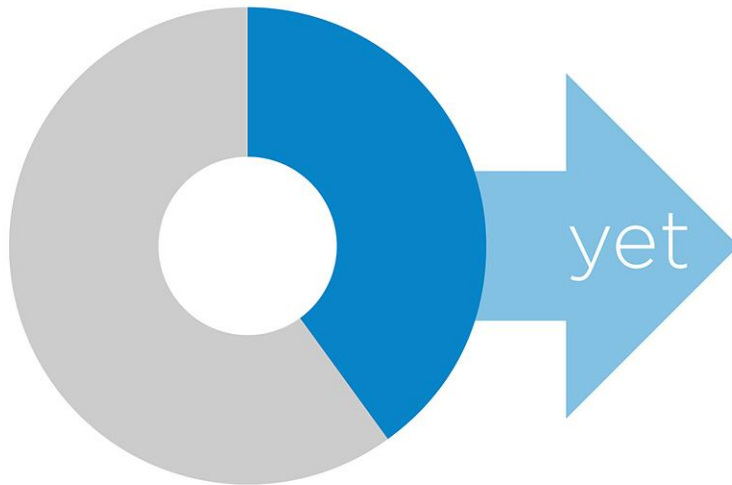
# + Family Office – Objectives by Importance



# + What are The Private Wealth Advisors Doing?



44% of Millennials



say they crave more financial education

SOURCE: ACCENTURE



Only 20% of advisors are targeting the children of their clients



53% of advisors meet with children just once per year



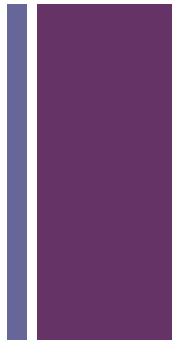
18% of advisors never meet with the children

# + What are The Private Wealth Advisors Doing?

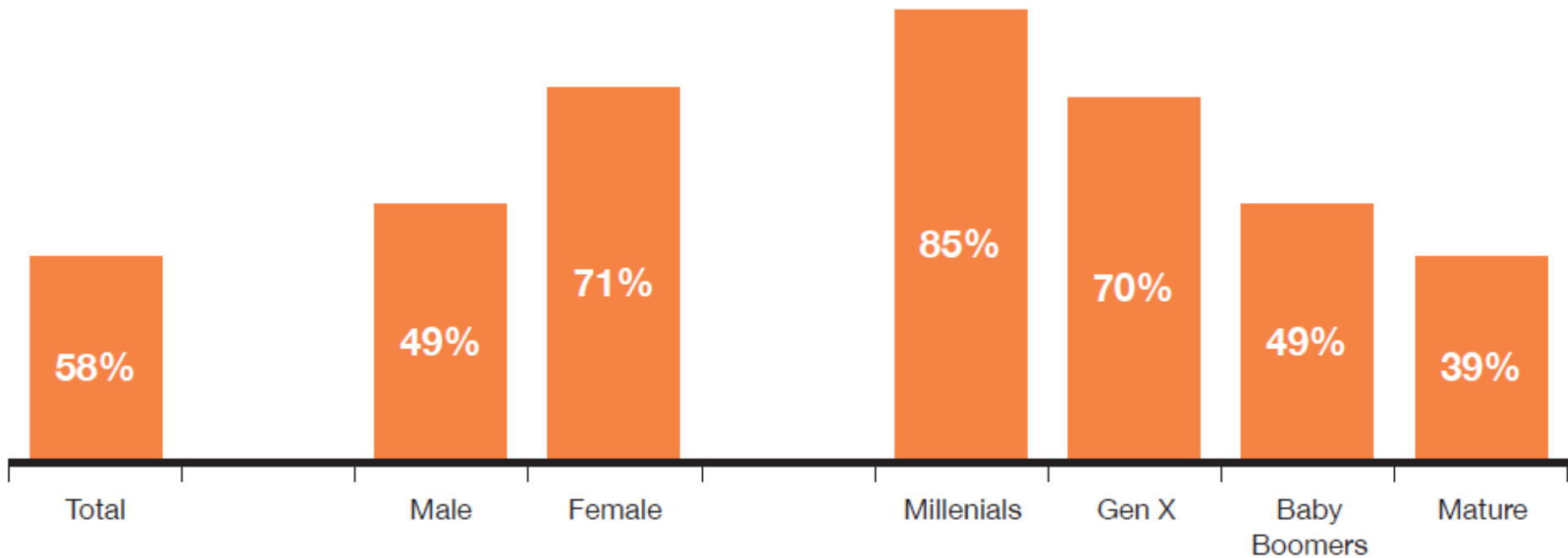


**Estimated that 98% of the Time When the Next Generation Inherits Wealth, She/He Switches Advisors**

# + Generational Wealth-Transfer Drives Impact Investing into the Mainstream

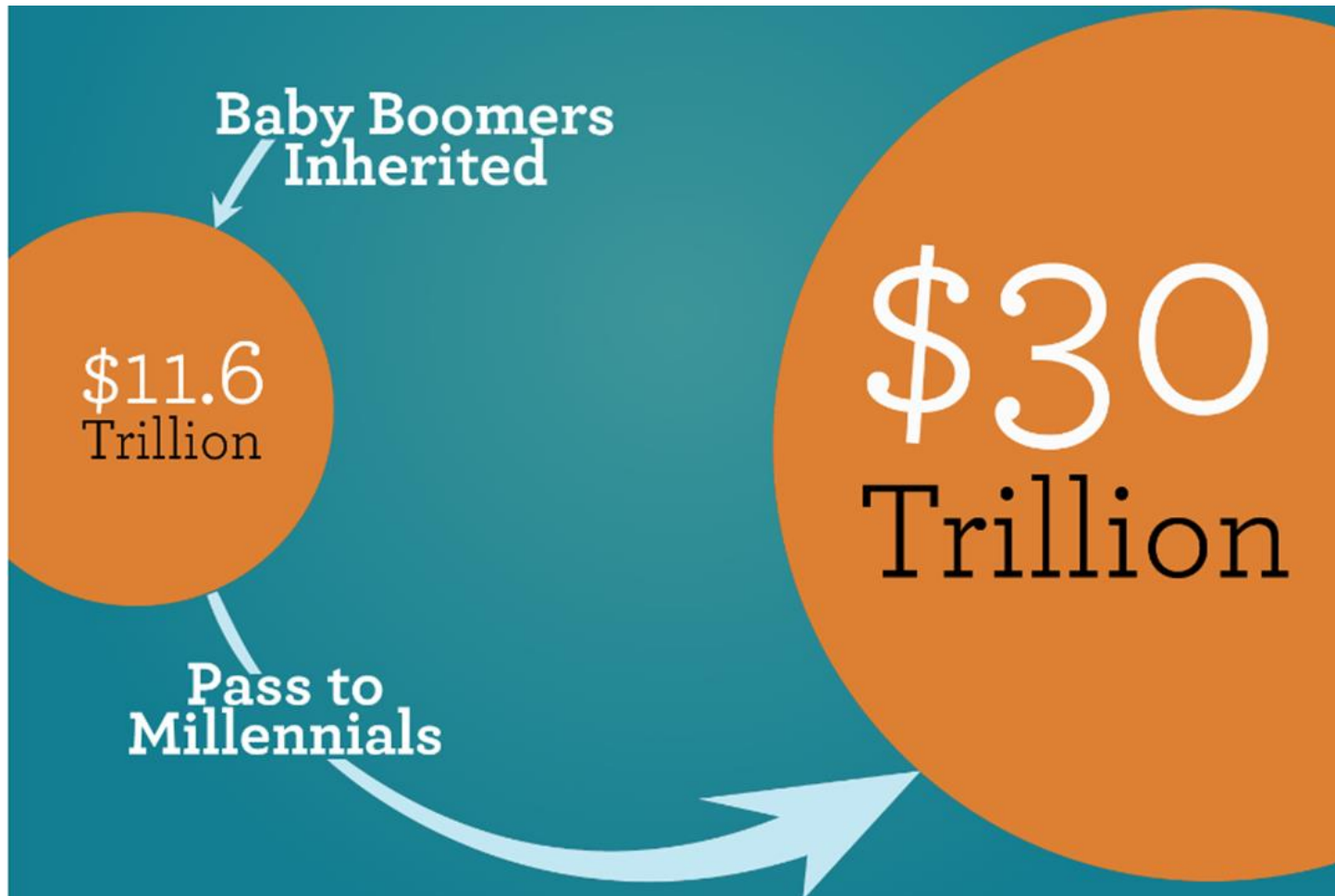


**% of HNW and UHNW Adults Who Agree Social or Environmental Impact is Important to Investment Decisions**



Source: US Trust Bank of America Private Wealth Management, Insights on Wealth and Worth Survey 2015

# + Generational Wealth-Transfer Drives Impact Investing into the Mainstream?



# + What Millennials Care About



# + Millennials Would take a 15% Pay Cut...

**35%** ...to work for a company committed to CSR

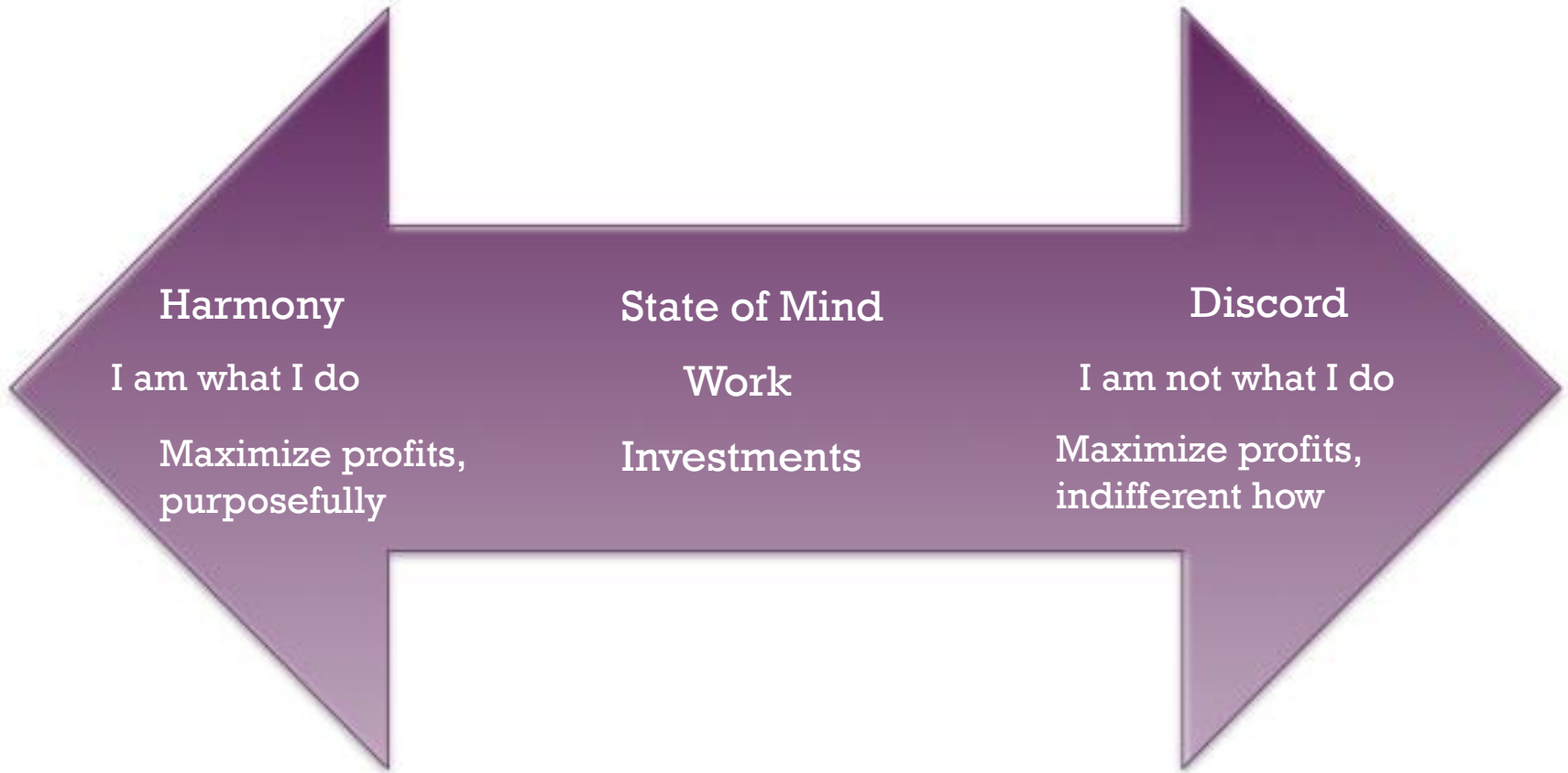
**45%** ...for a job that makes a social or environmental impact

**58%** ...to work for an organization with values like my own





# Harmony and Discord – Impact Investing vs Traditional Investing + Classic Philanthropy



+ The Revolution will be Live!



# + The Revolution will be Live!

All Investing Has Impact – How do you Choose to Participate?

