

Wealth Advisors: Go, See and Engage for CHANGE!

GRAYMATTERS
CAPITAL



ALIGN
Your Impact Partner



Miller Center
for Social Entrepreneurship

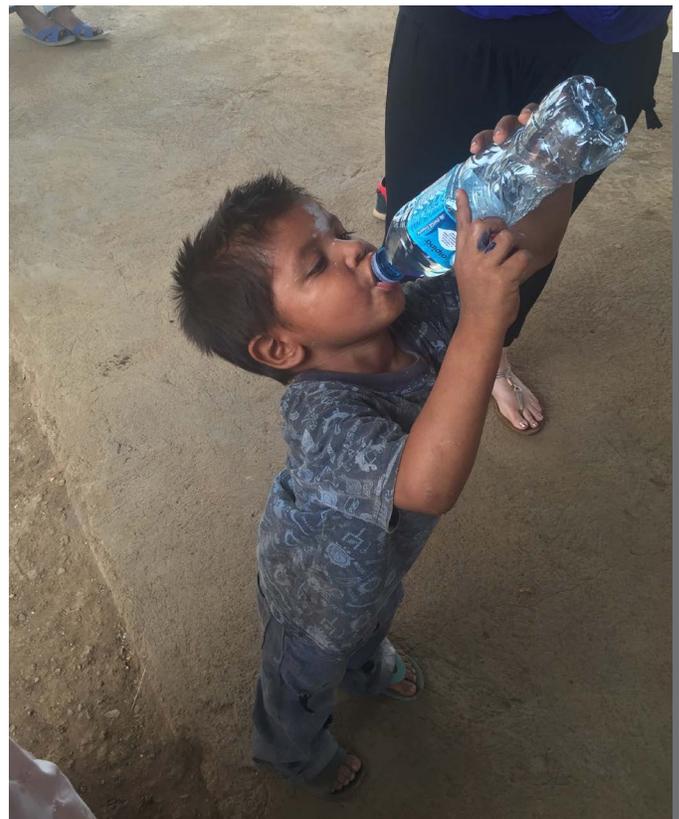


March & May 2017

Join us for a week-long, peer experiential learning journey to Latin America!

This unique opportunity will provide a transformational, hands-on learning experience for wealth advisors with a private investment emphasis. We will **connect** advisors with enterprise solutions, **explore** the regional impact investing ecosystem, and most importantly **engage** with local enterprises and stakeholders. We will offer **educational** and **financial value** to advisors through highlighting diverse sector enterprises and hands-on opportunities to work at the forefront of social innovation.

Are you seeking to align your personal and professional purpose? Have you been wondering if impact investing is the right path for your clients? And if it is, *where do you start?*



Choose Your Journey

Path 1: Paint the Impact Brush

March 12-19, 2017

Are you:

- Interested in a 360-degree view of the impact sector?
- Beginning your impact journey?
- Seeking to learn the what, why and how of impact?
- Interested in a broad Impact Investing 101 experiential learning opportunity?

This path will examine many investment opportunities providing exposure to diverse social enterprises and communities. After understanding the landscape analysis, you will be able to articulate the role impact can play in both your clients' charitable portfolios and investable assets.

Post-Journey, you will:

- Understand how social innovation is used to tackle systems change.
- Have met numerous, diverse potential partners in the local ecosystem.
- Be able to help clients who are seeking guidance to navigate impact opportunities.
- Have exposure to investable enterprises.
- Gain a more nuanced understanding of the challenges/opportunities of direct private investment in emerging markets.

Sectors for both paths include:

- Education
- Energy
- Mobile technology
- Microfinance
- Water/sanitation
- Healthcare

Path 2: Deep Dive into Change

May 2017 (Dates to be determined)

Are you:

- Looking to jump in and tangibly engage with an emerging market enterprise?
- Already somewhat knowledgeable about impact investing?
- Seeking to assist clients specifically with direct private investment opportunities or deals in emerging markets?
- Interested more in going and **doing**, rather than going and **seeing**?
- Interested in understanding how to conduct due diligence from the inside-out of a social enterprise operating in a remote community?

This path will focus on a deep dive within one community to explore how to enact systemic change by investing in impact solutions that eradicate issues in a population across multiple sectors. We will examine a few core enterprises and give you the opportunity to partner with one enterprise for a hands-on learning project. We will evaluate the enterprise's strategy, partner with management to tackle a key business problem, interview customers and stakeholders, and gain a 360-degree view of a specific social enterprise.

Post-Journey, you will:

- Understand how social innovation is used to holistically develop a community.
- Have a deep understanding of the on-the-ground reality for a social enterprise.
- Be better positioned to help clients with due diligence for direct investments and emerging market deals.
- Have identified a handful of promising and tangible investment and grant opportunities to offer to clients.

