

# Impact DAF



## Aligning investments and philanthropy

MakeWay's ImpactDAF is the first customizable donor advised fund in Canada to be 100% invested for impact.

An **ImpactDAF** at MakeWay offers a new way to maximize philanthropy for social and environmental good by bringing charitable giving and impact investing together in a single fund.

Impact investing nearly doubled between 2016-2017, indicating a sea change of people wanting to do more with their money by integrating economic, social, and environmental returns. However, blending philanthropic and investment tools in service to an aligned mission is still a challenge. MakeWay's ImpactDAF offers a unique solution where investments and grants have a shared purpose.

The ImpactDAF is designed for foundations, families, and individuals opening a fund with a minimum \$1M balance. Funds are invested with a customized strategy that ensures individual mission and values fit, and provides impact measurement using a methodology aligned with the UN Sustainable Development Goals (SDGs).

## What is an impact investment?

Impact investments are investments made in companies, organizations, and funds with the intention to generate social and environmental impact alongside a financial return.

## What is a donor advised fund?

Donor advised fund (DAF) is a fund held for charitable giving. DAFs offer a central place for all giving, therefore minimizing administrative costs and burden. Donors can contribute to the fund any time and receive a tax receipt—then recommend grants to charities over time.

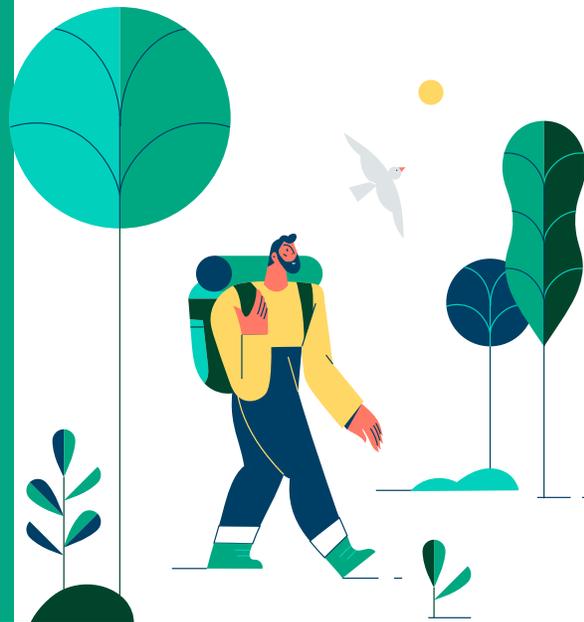
### Impact DAF is good for:

**Philanthropists** interested in supporting change-making initiatives through both grants and investments.

**High-net-worth individuals** already impact investing and looking to further activate their wealth with philanthropy and charitable giving.

**Foundations** interested in impact investing and looking for means to transform a standard charitable grant into impact investments and support charities that align with their mission or programming.

**Advisors** who manage wealth for high-net-worth families and individuals and want to offer their clients new valuable philanthropic options.



## How it works



Home of the Impact DAF, MakeWay works with donors to identify goals and customize the DAF. MakeWay then owns and administers the DAF including reporting on investments, and coordination of charitable grantmaking. MakeWay is a leading national charity that enables community-led transformation for social, environmental, and economic justice.



### Contact

To learn more about the Impact DAF, please contact:

**LEANNE BURTON**  
*Director, Partnership Development*  
leanne.burton@makeway.org  
647.792.0636 | 1.866.843.3722

Funds in MakeWay's Impact DAFs are invested with and managed by the Genus-SVX Impact Investment Counsel.

Genus-SVX Impact Investment Counsel: A strategic partnership designed to address the challenges faced by foundations, high net worth individuals, charities, endowments and pension funds, in becoming impact investors. The Counsel seeks to make impact investing easy to execute, and to mobilize \$100 million in capital toward impact investments by 2020.

Genus manages the Impact DAF investment portfolio as professional fiduciaries, allocating funds across the impact spectrum. SVX provides impact investment sourcing and due diligence for private equity investments of the Impact DAF.

