



A Perfect Match

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Philanthropists are committed to aligning their wealth and values – putting their money where their hearts are in order to have a positive impact. For those who have formalized their giving by establishing foundations or donor-advised funds, the focus is often on the funds used for grantmaking. This is a relatively small percentage of the charitable assets (sometimes 5% or less), while the remaining majority of assets (the “corpus”) are invested for preservation and growth, usually without regard to mission alignment.

Increasingly, philanthropists are taking a harder look at the charitable corpus and asking, “Is there a way we can put our investments to work on behalf of our charitable mission as well?” While this wasn’t always the case, the answer today is a resounding YES, and you don’t have to sacrifice returns in order to do it.¹

There are many ways to view your investing approach through an impact lens: negative and positive screens for Environmental, Social and Governance (ESG) factors, and impact investing opportunities, such as Program- and Mission-Related Investments (PRIs and MRIs). At Whittier Trust, we recognize that one size rarely fits all. Our approach is to create tailored solutions that fit your specific goals and reflect your values.

Our Philosophy – It’s About You

- We believe each client is unique and deserves investment solutions that are tailored to reflect their particular values.
- We focus on quality investments, analyze them against ESG factors that matter most to you, and then customize a portfolio of recommended investments for your consideration.
- By avoiding mutual funds, over which investors and their advisors have no control, we retain maximum flexibility to hand-pick the investments that align with the values and investment values of our private clients and their charitable giving vehicles.
- Examples of our tailored ESG solutions include investments in impact-screened equities, fixed income, venture capital and other private investments, MRIs and PRIs.

- Analyzing companies through an ESG, or impact, lens can actually enhance returns, because those that score high on the ESG scale are mitigating risks, reducing taxes and ensuring long-term sustainability. By selecting these companies your portfolio will align with your philanthropic values as well as grow your assets, including those used for grantmaking, over time.

Our Process

At Whittier Trust we have decades of experience customizing portfolios for clients using a high-quality investment philosophy that aligns with the principles of sustainability and ESG characteristics. The increased presence of ESG in the markets have taken our fundamental analysis further, and we can provide metrics to demonstrate the impact your particular investments are having.

Step 1: We begin by listening carefully to gain an understanding of your values and how you'd like to express those through your investments.

Step 2: We build a customized portfolio in alignment with your values. We conduct our traditional rigorous financial analysis that uncovers opportunities in the public and private markets, and then add another layer of diligence focusing on environmental, social and corporate governance considerations:

Environmental factors: Where/how does the company source its raw materials? What is its commitment to recycling? Does it use a manufacturing practice that minimizes harmful environmental effects? Has it identified a sustainable supply chain that does not deplete natural resources?

Social responsibility: How does the company treat its employees and customers? Do they report high levels of satisfaction? Does the company have low client and employee turnover?

Governance: Does management score high on integrity, accountability to investors, diversity and community engagement?

We can help you to join the increasing ranks of investors who are calling on companies to address issues such as climate change, animal cruelty, diversity and human rights.

Is Impact Investing Right for You?

Speak with your Whittier Trust Client Advisor about how impact investing can be incorporated into your investment strategy, or call us to learn more about becoming a Whittier Trust client. We are here to help!

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