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LETTER FROM THE TEAM

Welcome to the 2024 Who's Who in Impact Investing, an initiative of Impact Finance Center (IFC), where we're redefining the future of finance. Don't know us? Impact Finance Center is dedicated to transforming the landscape of impact investing by catalyzing capital into powerful engines delivering strong returns - financial, social and environmental.

IFC was established with the vision of creating a National Impact Investing Marketplace, aimed at identifying, educating, and activating impact investors while developing scalable infrastructure to connect these investors with social ventures. IFC collaborates with diverse communities to unlock full spectrum capital for urgent global challenges. By 2030, the goal is to mobilize \$1 trillion for good, driving a future where every investment fuels a meaningful impact for people and the planet.

Who's Who in Impact Investing is designed to create a regional directory that serves as a valuable resource and highlights over 80 leaders making significant contributions to the field. This directory simultaneously elevates visibility for impactful work and fosters connections among individuals and organizations, creating opportunities for collaboration and knowledge-sharing.

Another key initiative, CO Impact Days 2024, taking place on November 12th-13th in Denver. This conference focuses on building investor communities and marketplaces, providing opportunities for networking and sharing insights. Participants from Colorado and North America engage in a two-day executive education program covering innovative strategies, full spectrum capital, investor community building through Investor Accelerators, and effective deal flow sourcing via Opportunity Scans.

At IFC, we empower communities by crafting tailored approaches

that resonate with their unique characteristics—whether rooted in place, shared interests, or identity. A recent partnership with the Community Foundation of Northern Colorado focused on the region's housing crisis during an investor training session. The key question was: How much capital is needed to house everyone? A 20% down payment of about \$740 million is needed.

Using wealth screening tools and AI analytics, it was revealed that Northern Colorado has \$180 billion in private wealth. Leaders were motivated to learn that mobilizing just 0.41% of this wealth could provide housing for all in need. This initiative aims to ensure everyone has a home, rather than merely reducing the demand. Northern Colorado leaders are not alone in embracing this ideal. Momentum is growing in other communities, including Duluth-Superior, Alaska, Central Valley, Pennsylvania, and Essex County, to move these transformative goals forward.

The work doesn't stop at local initiatives. We're actively engaging with federal agencies to replicate successful models like the Department of Commerce's Build to Scale Capital Initiative, creating investor communities that support housing, business, and nonprofit sectors. This effort is part of a broader Main Street 2.0 Strategy, a bold move to shift investment power away from traditional tech-focused markets and toward community-driven solutions.

For example, our collaboration with the Walton Family Foundation, which resulted in a \$500,000 investment in a sustainable seafood venture at an unprecedented -50% interest rate—an innovative approach that combines a traditional donation (-100% return) with a recoverable grant (100% return). It was a win for everyone and unlocked more funds for future investments.

As we prepare to launch Phase Two of the National Impact Investing Marketplace initiative,

we're inviting organizations and individuals to participate in this transformative project. Our vision, outlined in a manifesto published in The Foundation Review, aims to establish ten community-based investment hubs anchored by local place-based funders, with the ambitious goal of aggregating \$500 million in strategic investments across these communities. This is an exciting moment to join us in shaping the future of impact investing.

Recognizing the need for initial funding to build sustainable infrastructure, plans are underway to debut Trustworthy Impact, an independent trust company dedicated to impact investing. Providing needed infrastructure, profits from the bank will also seed fund a \$100 million revolving loan fund offering recoverable grants.

And we're just getting started.

Don't miss your chance to be part of CO Impact Days—your opportunity to access strategies, connect with influential leaders through the Who's Who directory, and unlock resources. Let's redefine what it means to invest with purpose and create real, lasting impact together!

We hope you enjoy exploring the 2024 Who's Who in Impact Investing.

Stephanie L. Gripne



Stephanie Gripne, PhD.
Founder and CEO
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Unlocking Colorado's Wealth to Solve Community Challenges: Main Street 2.0

Have you ever wondered how much private wealth exists in Colorado? The numbers are staggering. Colorado is home to over 800,000 people with assets of \$1,000,000 or more, and 56,000 people with assets of \$5 million or more. The combined private wealth in the state is estimated to be \$1.62 trillion, though these figures are likely on the low end.

Now, imagine if we could mobilize just 1% of this private wealth to address Colorado's most pressing needs. That would amount to \$16.2 billion, enough to transform our housing sector, invest in local businesses, and support nonprofits across the state. We are not suggesting 1% more to philanthropy, we're suggesting investment. It's not just a hypothetical scenario—this is within our reach.

The question is: Are you willing to invest in your community? Would you consider lending capital to support a housing project or co-signing a guarantee for a local business? If the answer is yes, then join us! Together we can create innovative financial tools to channel local wealth into community impact.

One solution is to develop "Main Street" financial instruments that empower local investors. This could include a self-directed 401K or IRA for community projects, a "Main Street CD" known as a community note, or a private guarantee program. By pooling local wealth, we can invest in one another and ensure that Colorado's wealth is leveraged to solve our state's challenges.

We already have successful models from which to build. MCE Social Capital aggregates funds for microfinance institutions globally, and the Kachua Impact Fund, dedicated to impact investing, provides valuable examples. By combining the best elements of these approaches, Colorado could establish its own investment cooperative, community note, and private guarantee program, all focused on benefiting our local communities.

The question is: Are you willing to invest in your community? Would you consider lending capital to support a housing project or co-signing a guarantee for a local business? If the answer is yes, then join us! Together we can create innovative financial tools to channel local wealth into community impact.

The capital exists. What we need now is to educate, activate, and aggregate it in a fair and equitable way. With the right tools, we can harness Colorado's wealth to solve housing shortages, support small businesses, and address our most urgent social challenges. Let's work together to invest in each other and build a stronger Colorado for all. This is the core mission of the Impact Finance Center—building impact investor communities and connecting them with community leaders to tackle the greatest challenges of our time.

Want to learn more? Reach out to us at info@impactfinancecenter.org or 303-200-2060.

Trustworthy Impact – Revolutionizing Impact Investing through an Independent Trust Company

We are experiencing an \$81 trillion wealth transfer to women and younger generations, who prioritize investments that align with their values and seek positive social and environmental outcomes. Because trusts are the most common vehicle for intergenerational wealth transfer, there is a need for a turnkey solution that allows trustees to invest assets in alignment with the beneficiaries' values. While various bank trusts and independent trusts exist, none are solely dedicated to impact investing.

We are. Trustworthy Impact is offering a solution specifically focused on using trust resources to address the world's most pressing challenges. As the first independent trust company 100% focused on impact investing, Trustworthy Impact will shift financial power from traditional investment models to those prioritizing social, environmental, and community-driven outcomes.

A Comprehensive Approach to Impact Investment

An independent trust company is a financial institution that operates separately from banks and larger financial entities, focusing solely on managing and administering trusts with a strong fiduciary responsibility.

Unlike bank-affiliated firms, which may have conflicting interests due to their broader banking activities, independent trust companies prioritize

your needs and interests.

Choosing Trustworthy Impact allows you to align your trust with your personal values. You can invest in areas that matter most to you instead of being limited to traditional investment options that reflect the bank's priorities. This flexibility enables a tailored approach to trust administration, ensuring that your unique goals and family dynamics are taken into account.

Trustworthy Impact offers specialized expertise and continuity in management. The company also collaborates with your existing financial advisors to create a cohesive strategy that aligns with your vision for the future.

Join Us in Shaping the Future of Impact Investing

A prestigious foundation has extended an invitation to apply for a recoverable grant aimed at finalizing our business plan for Trustworthy Impact. Participation as a signatory of Trustworthy Impact or joining the advisory group offers an opportunity to contribute to this impactful mission. Together, we can work towards a more equitable financial system that prioritizes meaningful investments.

To learn more or explore joining our board of strategic advisors, please contact Susanna Penfield at susanna@impactfinancecenter.org.

CASE STUDY

Workforce Affordable Housing for U.S. Forest Service Employees

Attracting and retaining a skilled workforce for the U.S. Forest Service (USFS) has become increasingly difficult due to the lack of affordable housing in remote areas. The White River National Forest (WRNF), one of the most visited national forests in the U.S., has seen a 56% job declination rate over two years, with 85% of declines citing the lack of affordable housing as the primary reason. To address this issue, WRNF is partnering with Summit County Government, Impact Finance Center

(IFC), and the State of Colorado to pilot a workforce housing project.

Project Overview

Located at the Dillon Ranger District Work Center in Summit County, Colorado, the project plans to build 162 workforce housing units at an estimated cost of \$86 million. Leveraging new Farm Bill authority, which allows the U.S. Forest Service to lease administrative lands, 10 units will be designated for long-term U.S. Forest Service housing, while 30

double-occupancy beds will be reserved for seasonal employees. All remaining units will be available for people working in Summit County, specifically targeting the "missing middle" earning 80-120% of the local Area Median Income (AMI). The project aims to create a replicable model for the U.S. Forest Service and its partners nationwide.

Innovative Approaches

Two innovations are being explored in this project. The first is the use of Farm

Bill authority to lease U.S. Forest Service administrative lands, and the second involves bringing in community members who want to co-invest in the project through private guarantees (i.e., co-signing) or offering low-cost debt. Both innovations are designed to make the project more attainable for all parties involved.

This project could serve as a model not only for the U.S. Forest Service but for the rest of the country, offering solutions to address workforce housing needs in other regions.

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WINNERS

ACCOUNTANTS



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Tony Gales is a Tax Partner at BPM with over 20 years of experience managing multi-million-dollar client accounts. A skilled CPA and business leader, he excels in contract negotiation, IT applications, and corporate branding. Proficient in various accounting software, Tony adeptly manages projects and deadlines in fast-paced environments.



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Lizette Peña, CPA, is the Treasurer and Board member of Kachuwa Impact Fund, which invests in private impact companies and real estate. Guided by her passion for using business as a force for good, she has over 30 years in finance and serves as Fractional CFO at Ascent CFO Solutions, collaborating with mission-driven organizations to enhance growth and financial strategies for positive social impact.



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Sandy Shoemaker is President of Shoemaker Consulting, specializing in employee ownership transitions. With over 20 years of experience, she advises companies on ESOPs and serves on several boards. As a commissioner on the Colorado State Commission for Employee Ownership, Sandy promotes shared wealth models, stating, "If I can help create more ESOPs by educating and guiding companies through this transition, we can build stronger businesses and we will see employees' wealth grow."

ATTORNEYS



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Bruce has over 15 years of experience as a legal advisor in impact investing. He specializes in representing family offices, foundations, and community-based finance organizations, providing guidance to support their mission-driven investments. Blue Dot Law has facilitated over \$324 million in impact deals globally, showcasing Bruce's commitment to advancing positive social change.



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Karyn Polak, Founder and Chief Activator at Shift the Prism, connects and consults with founders, funders, and impact ecosystem builders to drive intentional capital allocation. Her work focuses on transforming "complacent capital" into purposeful investments and breaking down silos across finance, fostering a collaborative, impact-driven financial ecosystem aligned with meaningful change.



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Tom Scriven is a creative problem solver and Senior Counsel at RPCK Rastegar Panchal, LLP, where he heads the Denver Office and is a Partner at Renew Capital. Since 2008, he has focused on the impact sector, co-founding an angel investment firm for gender-smart investing in Africa. A finalist for the 2022 Grunin Prize at NYU Law School, Tom also leads workforce development initiatives for newcomers to Colorado and serves on several boards of mission-driven organizations.

BANKS



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Kent Curtis, CEO of First Southwest Bank, has led this rural Colorado-based CDFI for 13 years, championing underserved communities. He established the First Southwest Community Fund, a 501(c)(3), to extend support, and, with the bank's HelloBello software, he and his team advance inclusive financial services for overlooked populations.



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Tom Ogaard is President and CEO of Native American Bank, a mission-driven CDFI dedicated to providing access to capital for Native American Tribes and their corporations across the U.S. The bank specializes in lending on Federal Trust Land, leveraging partnerships with non-profits and other entities to fund credit opportunities in underserved areas.



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Jonathan Taylor is a dynamic and results-driven executive serving as Senior Vice President and West Regional Director at Amalgamated Bank. With over 13 years of experience in commercial banking, he leads lending programs, drives business growth, and achieves profitability. Jonathan is passionate about fostering client relationships and delivering financial solutions aligned with community priorities.

COMMUNITY DEVELOPMENT FINANCIAL



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Matt Eldridge is the Executive Director at Realize Impact, a nonprofit mobilizing philanthropic capital to fund impactful enterprises. Since 2020, the organization has secured over \$50 million in grants for companies with social and environmental benefits. With 30 years of experience, he previously served as CEO of Oikocredit US, a \$1 billion+ cooperative that makes impact investments in Latin America, Africa and Asia.

COMMUNITY FOUNDATIONS



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Sara Boyd is a retired wealth management professional and a member of The Denver Foundation Impact Investment Committee and the Women's Foundation of Colorado Investment Committee. She has experience running a socially responsible investment strategy and advising clients on impact investing. Sara actively engages in the community through luncheons, conferences, and webinars.



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Kelly Dunkin is President and CEO of Colorado Gives Foundation, which began its impact investment journey in 2016 with energy-efficient upgrades for low-income housing. The foundation has expanded to include a successful Pay for Success program for students in foster care, a no-interest loan fund for BIPOC-led nonprofits, and a \$15 million housing fund for affordable

housing projects. Kelly's approach integrates advocacy, local collaboration, and innovative solutions to tackle community challenges.



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Renee Ferruffino is the Vice President of Development at The Women's Foundation of Colorado (WFCO), where she designed the gender-lens investment strategy to align financial policies with mission-driven values. She leads WFCO's programmatic investment committee, overseeing impact investment programs and initiatives like the donor-advised fund platform and the Women's Impact Investing Giving Circle.



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James Hamilton, Director of Development and Philanthropic Services at the Community Foundation of Northern Colorado, collaborates with forward-thinking fundholders to align financial returns with social impact. In his role, James leads efforts to assess community market opportunities for impact investments, develop strategies that meet fundholders' philanthropic goals, and works with the Finance Committee to streamline policies that enhance impact investment flows.



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Ben Perry and The Denver Foundation provide catalytic, place-based investments in the Metro Denver community through their Impact Investment Pool, and support donor-advised fund holders in creatively and impactfully deploying their capital

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Kaylene Alvarez is the CEO and Managing Partner at Athena Global Advisors, which promotes access to finance for small and medium enterprises in emerging markets. With a systems approach to structured finance, she specializes in innovative deal structures that support impact investing principles and foster collaboration across industries and countries.



A passion for people is in our *DNA*.

Guiding your family in shaping a legacy of impact investing and long-term generational growth.

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Jennifer Astone is Ecosystem Director at Collective Action for Just Finance, co-curating The Transformative 25, which highlights impactful funds. In 2019, she established Integrated Capital Investing to guide foundations in utilizing all assets for just economies. Previously, as executive director of the Swift Foundation, she aligned a \$60 million endowment with impact portfolios. Jennifer leads agroecological projects and is a Just Economy Institute fellow, residing on unceded Awawas land in California.



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Dr. Sara Bayless is Vice President at OMNI Institute and Managing Director of the Center for Social Investment, which she launched in 2024 to measure the impact of innovative funding models. With four years of experience in evaluating impact investment outcomes, she partners with nonprofits to refine theories of change and develop relevant performance metrics for tracking progress. A former Board Chair for Social Venture Partners – Denver, Sara focuses on providing reliable data to support positive social change.



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Josh Cashman is a Principal at iCubed, specializing in due diligence and investment management selection for mission alignment. iCubed understands the unique nature of foundations and family offices, working with clients to align capital objectives with their missions. The firm bridges philanthropic goals and impact investment potential, striving to advance the outcomes achieved by foundations and nonprofit organizations through impact investments.



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Theresa Deibele is a Principal at Occam Advisors in Portland, Oregon, with two decades of experience in impact investing, finance, and philanthropy. She manages local impact investments

for the Oregon Impact Fund, facilitating over \$10.3 million for affordable housing and community initiatives. Additionally, she guides the Silicon Valley Community Foundation's Integrated Capital Fund and previously led the Housing Opportunities Portfolio at Meyer Memorial Trust, managing over \$20 million in program-related investments.



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Travis Green, Project Director at the Investment Project, helps community foundations and health conversion foundations build local impact investing programs. In 2024, he launched the Community Investment Project to accelerate local impact investing rooted in community leadership. Its vision—all communities can mobilize the assets they need to prosper and thrive—aligns with Travis' work supporting 35 foundations across 16 states in committing \$175 million for projects in housing, food systems, and childcare.



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Colleen Kazemi is a leader in impact investing with over 20 years of experience promoting economic equity across sectors, partnering with Fortune 100 companies and social impact investors alike. As a coach, she offers strategic guidance and has mobilized millions in philanthropic funding through her role as CEO of Social Venture Partners Denver. A biotech entrepreneur, Colleen has successfully scaled purpose-driven ventures and built partnerships that drive financial and social returns.



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Alison Lingane is a nationally recognized expert in employee ownership and a serial social entrepreneur dedicated to using business for social good. She founded the Ownership Capital Lab to enhance financing strategies for employee ownership, and co-founded Project Equity, addressing income inequality and supporting local businesses. Alison has received multiple fellowships and, in 2022, was awarded the Heinz Award for the Economy, to celebrate the vision and spirit that produce achievements of lasting good.

WINNERS



Kate Lyda
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Kate Lyda, Principal at Staro Insights, brings extensive experience facilitating impact-first investments for philanthropic investors and nonprofits. Specializing in technical assistance and investment readiness, she supports community-driven organizations in aligning capital for meaningful social impact—reflecting Staro Insights' mission to advance community-focused outcomes.



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Ben Moultrie is the Managing Partner at Spock Ventures, a focused venture capital fund dedicated to investing in technology solutions for the aging population. With a commitment to fostering impactful solutions, he leverages his expertise to drive advancements in this crucial sector.



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Sean Penrith, CEO of GKS, is a leader in impact investing with 20 years of experience in conservation finance and environmental policy. He develops market mechanisms to combat climate change and advises on impact fund structures across various sectors, including forestry and renewable energy. His work with the Innovative Finance for National Forests (IFNF) program enhances the resilience of the National Forest System by leveraging capital. Sean is committed to advancing sustainable practices in Colorado.



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Vanessa Roanhorse, CEO of Roanhorse Consulting, champions Indigenous perspectives in health and wealth systems by designing collaborative, community-centered initiatives. Her work connects diverse partners to create sustainable, culturally rooted solutions. Roanhorse Consulting is committed to building an equitable future by embedding lived experiences and values into impactful systems.



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Mike Silvestri is Vice President of Impact Investing at Social Finance, where he leads advisory services that mobilize philanthropic assets toward impact-first investments. He works with foundations and family offices on diverse issues such as education and climate change, supporting clients throughout their impact investing journey. Mike has developed a workforce fund for low-income Coloradans and is a frequent speaker at industry events, with his insights featured in major publications.



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Jenn Uhen is the Founder of The Pledgettes, a personal finance community for women that facilitates values-driven discussions on wealth accumulation and distribution. As a real estate investor, she offers below-market rent to long-term tenants, balancing fair returns with community support. Jenn prioritizes impact investing over short-term gains. Her motto: Supporting the curious to get started.

» DONOR ADVISED FUND PROVIDERS



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Timothy Freundlich is the Founder and Executive Director of Strategic Development at ImpactAssets, where he innovates financial instruments for impact investing. While at Calvert Impact Capital, he launched ImpactAssets as an impact investment-based Donor Advised Fund, which spun out in 2010 and now manages \$3 billion in assets. He also co-founded Good Capital and the SOCAP Conference.



Rich Hoops
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Rich Hoops is the Executive Director at Impact Charitable, where he has been making direct impact investments in the U.S. and abroad for over a decade. His work focuses on creating innovative, catalytic capital for impact-first projects, inspiring others to follow suit in the impact investing space.



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Cindy Willard is the Senior Director of Capital Activation at Impact Charitable, recognized for her expertise in moving catalytic capital and developing integrated capital strategies, including program-related investments. Her leadership plays a crucial role in advancing innovative funding solutions for impactful initiatives.

» FAMILY OFFICES



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Jim Bunch is the Managing Director at Coinvest Fund, bringing 25 years of experience in impact investing across social and environmental sectors. He previously led private market investing at Imprint/Goldman Sachs and New Island Capital, and was an early investor in microfinance at Omidyar Network. Currently, he is helping to scale Gary Community Ventures' place-based investing approach through the CO/invest platform to drive impact in Colorado.



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Santhosh Ramdoss is the President and CEO of Gary Community Ventures, where he establishes partnerships with impact fund managers. He previously launched financial institutions at BRAC and founded multiple start-ups, including ThinkChange India. Santhosh also incubates initiatives like The Dearfield Fund for Black Wealth, aiding Black homebuyers in Denver.

» FUNDS



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Ed Briscoe is a Co-Founder and Principal at Weave Finance, focusing on impact-first organizations and funds. He has played a pivotal role in the CHAI Fund, which pioneered the Tenant Equity Vehicle in Colorado, aiming to enhance tenant ownership and equity in housing.



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Dara Erck is the Founder of SAM+LEO, specializing in impact investing within the global health and social enterprise sectors. With experience in mobilizing resources for high-impact solutions like vaccines, she previously consulted for the Bill & Melinda Gates Foundation, advancing global health R&D and facilitating investments in underfunded areas. Dara focuses on aligning business growth with social good, particularly in supporting teen mental health, while balancing social outcomes with profitability through strategic partnerships.



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Jessamine Fitzpatrick is the Co-founder and Managing Director of Alder Point, focusing on integrating finance with environmental sustainability. With a strong background in impact investing, she built a \$600 million portfolio in farmland and timberland. Co-founding Alder Point in 2022, she aims to provide profitable investment alternatives centered on regenerative practices, decarbonization, ecosystem restoration, and community prosperity. The firm is currently raising a fund dedicated to timberland and farmland investments in the U.S.



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Mark Lewis is the Managing Partner at Trailhead Capital, which focuses on early-stage venture capital investments in regenerative food and agriculture. The firm aims to support innovative companies that promote sustainable practices, enhance food systems, and drive environmental stewardship within the agricultural sector.



Cedric Lipsey
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Cedric Lipsey, Founder and CEO of Clusivi, leads this social impact startup as a recipient of impact investment. While newer to the impact investing space, Cedric channels his entrepreneurial vision into advancing Clusivi's mission, striving for meaningful social change through innovative solutions.

WINNERS



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Janice St. Onge serves as President of Flexible Capital Fund, L3C, an impact investment fund and CDFI focused on revenue-based financing and patient equity. For over 13 years, Janice has supported New England's food, forestry, and climate solutions sectors, fostering sustainable growth and impactful change across the region



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Rich Shockey, CEO of SVP Denver, leads an organization focused on innovative funding solutions, offering participatory grantmaking and low-interest debt from partner-members. His leadership empowers local nonprofits and social enterprises through flexible financial support and community-driven collaboration, building resilient, sustainable communities

» INTERMEDIARIES



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Asia Edwards, Director of Loan Servicing at Nonprofit Finance Fund (NFF), leads initiatives in fair and ethical debt management for nonprofit clients. Recently, Asia contributed to NFF's BEACoN initiative, empowering communities with asset control—like land and affordable housing—fostering sustainable wealth-building and community strength.



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Tripp Wall, Founder and CEO of Pantheon Regeneration, is an impact investor with nearly two decades of experience. He previously launched Trailhead Capital, a regenerative climate and agriculture VC fund, and now leads Pantheon Regeneration, a Public Benefit Corporation focused on scalable solutions for restoring ecosystems and addressing climate challenges.



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Aisha T. Weeks, Managing Director of the Dearfield Fund for Black Wealth, leads an impact fund focused on closing the racial wealth gap by increasing Black homeownership. With over 20 years of experience in banking and community development, Aisha has guided the fund in providing over \$8 million in down payment assistance and raising more than \$13 million in capital.

» IMPACT INVESTING SUPPORT ORGANIZATIONS



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Steve Fross, Senior Director at the Jewish Federation, supports an umbrella network of 146 chapters managing \$43 billion in assets. His efforts focus on advancing social impact investing through ESG, legacy planning, and fostering next-generation engagement in philanthropy.



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Lauren Grattan, Chief Community Officer at Mission Driven Finance, leads efforts to design and manage impact investment funds that foster a more inclusive, equitable economy. Working with investors and community partners, Lauren ensures that businesses gain access to essential capital, aligning investments with meaningful, transformative outcomes



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Patricia Foley Hinnen, Founding CEO of Capital Sisters International, is a trailblazer in Gender Lens Investing. With nearly 30 years of experience, Patricia introduced the first women's bond for microloans and has co-founded multiple microfinance initiatives, advancing economic empowerment for women worldwide



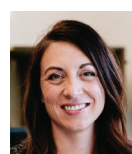
Vivienne Hsu
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Vivienne Hsu, Founder and CEO of LENDonate, leads the creation of a collaborative financial ecosystem for nonprofits, empowering mission-driven organizations with affordable financing solutions. Under Vivienne's leadership, LENDonate has facilitated over \$85M in loans, achieving a remarkable 1.5% default rate while transforming capital mobilization for social impact.



Emily Laintz
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Emily Laintz, Director of Investments at Kiva Capital, brings a wealth of experience from managing microfinance initiatives in Latin America to advancing blended finance at Impact Charitable. Now, she oversees debt financing and technical assistance for financial service providers across Asia, Africa, and Latin America, fostering global social impact.



Courtney Lussenhop
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Courtney Lussenhop, Director of Impact at Community Impact Fund, leverages extensive experience in both for-profit and nonprofit sectors to drive sustainable, multi-pillar impact. With a focus on fundraising, volunteer management, and direct assistance, Courtney empowers organizations to achieve strategic goals that uplift individuals, families, and entire communities



Jeff Ochs
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Jeff Ochs, CEO of Venn Foundation, leads innovative efforts in Program-Related Investments (PRIs) and catalytic capital. With a focus on PRI syndication, concessionary capital, and donor-advised funds, Jeff enables impact-driven investments that support sustainable, transformative change across philanthropic and financial landscapes.



Mike O'Donnell
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Mike O'Donnell, Executive Director of Prairie Rose Development, is dedicated to fostering entrepreneurial ecosystems and providing character-based lending solutions for small businesses. Aligned with Prairie Rose Development's mission, Mike empowers emerging entrepreneurs and supports sustainable economic growth that strengthens community resilience.



Marie Peters
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Marie Peters, Fund Director of B:Side Capital and B:Side Fund, champions inclusive lending to bridge the wealth gap through entrepreneurship. Overseeing direct lending programs, she has facilitated over \$25 million in loans, supporting hundreds of under-served entrepreneurs. Committed to economic equity, Marie also serves on the boards of Habitat for Humanity Colorado, Access Mode, Rocky Mountain Microfinance Institute's Growth Loan Review Committee, and is a member of the Inclusive Capital Collective.



Anna Smukowski
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Anna Smukowski, Senior Director of Capital Programs at Enterprise Community, is a leader in impact investing and CDFIs. She manages a \$100 million retail note offering supporting community facilities, affordable housing, and racial justice, and has structured off-balance sheet funds to advance community development nationwide.

WINNERS

» INVESTMENT ADVISORS



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Stephanie Cohn Rupp is CEO of Veris Wealth Partners, specializing in aligning investments with values. With over 20 years in impact investing, she has held leadership roles at Tiedemann Advisors and Toniic. Stephanie has co-authored The ImpactAssets Handbook and regularly contributes to impact sector publications. Under her leadership, Veris won multiple awards for ESG and impact investing, including the Best Impact Investing (Advisory) Firm in 2024.



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Jonathan Firestein is the Chief Investment Officer at Purpose Capital Funds, where he inspires asset owners to activate portfolios for mission alignment across private and public markets. With experience as an investment analyst, advisor, and portfolio manager, he develops cash flow models and scenario planning tools. Jonathan is pioneering the first fully diversified impact alternatives to the U.S. Core Aggregate Bond Market, making impact investing accessible to all investors.



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Brian Lichtenheld is a Financial Advisor at BSW and the Director of Sustainable Investing. An advocate for impact investing, he has directed over \$100 million into value-aligned investments for individuals, families, and non-profits. A strong supporter of BSW's B Corp Certification, he recently joined B Lab's Climate Finance Action Cohort and has spoken on investment alignment at the Mountain West B Corp Leadership Development Conference.



Emily Winslow
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Emily Winslow is an Associate Director at Pathstone, based in Denver, Colorado. She leads Advisory Services and client coordination for high-net-worth clients, crafting personalized ESG and impact investment solutions. Previously, she was Chief of Staff at Change Finance, focusing on ESG investment products. With over 10 years of experience, Emily has guided wealth-building strategies and managed ESG portfolios, supporting clients across the U.S.

» INVESTMENT FIRM



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Danielle Burns is Managing Director of Growth at Adasina, with over 20 years in impact and community investing. She partners with diverse investors to align financial goals with social impact. Her passion for impact investing is fueled by the belief that financial systems should be a force for good, promoting equality and sustainability.



Karen Gados
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Karen, Managing Partner at Pikes Peak Capital, brings 15 years of experience in affordable housing investments and bridge-to-homeownership programs for low-to-moderate-income families. With a focus on sustainable impact, she is dedicated to advancing renewable energy solutions for disadvantaged communities, including community solar and solar micro-grids.



Craig Jonas
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Craig Jonas is the CEO of CoPeace PBC, which employs innovative impact investing strategies, including equity crowdfunding, to create inclusive wealth. As a certified B Corp, CoPeace focuses on funding growth-stage ventures to drive measurable social impact. The team not only invests capital but also offers guidance to portfolio companies.



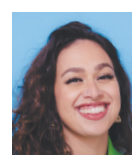
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Michael Kent is a Partner and Co-founder at New Leaf Climate Partners, an investment and advisory firm focused on financing nature-based solutions to address the climate crisis. He leads blended finance strategies that leverage public and private capital to invest in underserved communities. Previously, Michael was a founding director at BlackRock Sustainable Investing, where he developed climate products and advisory services.



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Bo Parfet, Managing Principal and Head of Growth at DLP Capital, spearheads initiatives that align financial growth with meaningful social impact. With a deep background in impact investing, Bo co-founded Denali Venture Philanthropy to support entrepreneurs tackling critical global issues, such as poverty and sustainability, reflecting his commitment to positive change through capital.



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Jasmine Rashid, Director of Impact at Candide Group, is a financial activist focused on redirecting capital for social justice. She has guided the #FamiliesBelongTogether coalition in shifting billions from harmful industries. Jasmine invests in women and BIPOC-led ventures and authored The Financial Activist Playbook to share strategies for reclaiming wealth.



Phil Swan
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Phil Swan is the Director of Business Development at Terra Alpha Investments, a sustainable investment firm that prioritizes natural resource efficiency in its analysis. The firm focuses on global public equities to foster a sustainable economy, aiming for improved financial and environmental outcome as they strive to make a better world for all.



Ken Tsunoda
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Ken Tsunoda, Co-Founder and Co-CEO of Deep Community Capital, aims to make impact investing fun and accessible. A Just Economy Institute Fellow, he invests his retirement assets for social good and has initiated two impact investing circles for shared learning. With Deep Community Capital launching in 2025, Ken will empower individuals to become self-directed impact investors, opening opportunities previously available only to foundations.

» INVESTOR



Tom Abood
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Tom Abood is a Citizen and Community Impact Investor who transitioned from Wall Street to angel investing. He supports Community Development Financial Institutions (CDFIs), leads workshops on impact investing, and co-founded a Slow Money group to lend to local farmers, aligning his investments with values prioritizing people, planet, and equity.



Melanie Davidson
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Melanie Davidson is the Owner and CEO of Scream Agency, specializing in early-stage impact investments, particularly in ventures led by female founders. With a strong background in strategy and marketing, she evaluates investments based on the founders' purpose and long-term impact, aiming to empower socially responsible businesses, always focusing on the "why".



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Janine Firpo is Co-Founder and President of Invest for Better, which empowers women to invest in impact-focused ventures. With over two decades of experience at the intersection of technology, business, and poverty reduction, she authored Activate Your Money and has reached nearly 3,000 participants, available in multiple languages. Her work aims to align personal values with investment strategies.



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WINNERS



Kori McClurg
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Kori McClurg is an impact investor and socially conscious business owner dedicated to aligning work with positive social outcomes. Kori's business approach integrates purpose with profitability, fostering initiatives that support sustainable and community-centered impact.



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Praful Shah is a Board Director focused on women-founded, impact-oriented start-ups. With expertise in the life sciences, he guides innovative ventures aimed at social and environmental impact. Praful champions diversity in entrepreneurship, promoting ethical business practices and empowering emerging leaders to create sustainable development solutions.



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Rick Simms is the owner of R Simms PC and a co-founder of WeeSchool, an online resource for parents that was sold to KKR. He now invests in social impact companies, including accessibleGO, a travel site for individuals with disabilities, and leads No Excuses Unlimited, supporting U.S. Paralympic teams.



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Jacki Zehner is the Founder of SheMoney and the youngest woman to make partner at Goldman Sachs. A trailblazer in the financial sector, she has been a strong advocate for gender-lens investing. Through SheMoney, Jacki aims to enhance women's financial agency and wellness, particularly in investing.

» PRIVATE FOUNDATIONS



Ben Bynum
Senior Director, Impact Investing
Colorado Health Foundation

Ben Bynum is the Senior Director of Impact Investing at the Colorado Health Foundation. In his role, he focuses on strategies that align health outcomes with community investments, driving social impact in healthcare. Ben is committed to fostering partnerships that enhance health equity and access throughout Colorado.



Janice Fritsch
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Janice Fritsch is the President of the Kenneth King Foundation, where she has led efforts to adopt an impact investing strategy, investing \$3.5 million in program-related investments. She also co-founded iiiQ, a consultancy focused on educating philanthropy about charitable impact investing.



Ann Hovland
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Ann Hovland is the Chief Financial Officer at the Bonfils-Stanton Foundation, where she aligns the foundation's investments with its mission through socially responsible and mission-driven strategies. Working closely with the Investment Committee and program staff, she promotes equity and innovation by using catalytic investments that connect the arts with community impact.



Alece Montez
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Alece Montez is Co-Executive Director at AJL Foundation, where she leverages her impact investing expertise to foster meaningful partnerships. Her approach emphasizes collaboration and capacity building, aligning financial resources with social and environmental goals. Alece is dedicated to creating lasting change by empowering organizations to achieve their missions.

Veris has been helping families & foundations align their financial assets with their values and vision for the future since 2007.

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Kelsey Nolan

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Kelsey Nolan is the President and CEO of the Dakota Foundation, a small private foundation that has executed over 60 program-related investments in its 25+ year history. Under Kelsey's leadership, more than half of these investments have been made, demonstrating the unwavering commitment to impactful philanthropy.


Kristi Petrie

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Kristi Petrie is Co-Executive Director of the AJL Foundation, where she champions a fully mission-driven approach by aligning 100% of the foundation's endowment with its values. Her work includes impact investing, community-centered banking, and shareholder engagement initiatives. Under her leadership, AJL emphasizes diversity and accountability, earning a platinum rating from the Endowment Impact Benchmark.


Ruth Shaber

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Ruth Shaber, MD, is a changemaker and co-founder of the Tara Health Foundation, which promotes women's well-being through evidence-informed programs. Formerly an OBGYN and senior executive at Kaiser Permanente, she also chairs Rhia Ventures, a collective focused on reproductive health investment. Her book, *The XX Edge*, underpins her initiative, The Diverse Investing Collective, aiming to increase assets managed by diverse teams to 33% by 2033.


Gary Steuer

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Gary Steuer is President and CEO of the Bonfils-Stanton Foundation, overseeing investments that are over 70% values-aligned. He has allocated 8% of the corpus to mission-aligned investments, including Program Related Investments, such as Lighthouse Writers Workshop. Gary also focuses on educating smaller foundations about impact investing and inspiring them to adopt similar practices.

» SOCIAL VENTURE

Gemma Lockhart

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Gemma Lockhart is a Director involved in the WOMAN IN THE NATION venture, inspired by support from the Women's Impact Investing Giving Circle and the Colorado Women's Investing Circle. She is developing Buffalo Creek Pass, a dramatic series based in Colorado that aims to employ over 400 women in production roles.


Sekhar Paladugu

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Sekhar Paladugu is Co-Founder and CEO of Ritter and a Trustee at Next50. He integrates an Aging-Lens Investing Framework into their impact investing strategy, focusing on economic opportunity, healthcare, and social inclusion for older adults. Sekhar's approach aims to create lasting, mission-driven impacts in aging and caregiving.


Nat Robison

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Nat Robison is a serial social entrepreneur and Co-Founder of Leaf Global Fintech, which offers blockchain-based financial solutions for refugees. He previously founded Juhudi Kilimo, providing micro-asset financing to Kenyan farmers. Nat also serves on the investment committee of the Opus Prize Foundation and the Colorado Bar Association.


Ted Vail

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Ted Vail, Founder and CEO of Excellevate, combines AI and impact investments to advance global human flourishing, guided by the company's motto, "technology meeting humanity." Through these initiatives, Ted fosters sustainable solutions in areas like healthcare access and redemptive real estate, bridging technology with meaningful, people-centered impact.

» OTHER

Cliff Feigenbaum

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Cliff Feigenbaum is the Founder and Publisher of GreenMoney Journal, which has been covering impact investing and community development since 1992. Through his work, Cliff has played a pivotal role in promoting sustainable finance and educating investors about socially responsible investing practices.


Jessica Maiorca

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Jessica Maiorca is an Innovative Financing Consultant working to diversify funding for workforce education and training in Colorado, aiming to expand access for resource-limited individuals. Her efforts focus on creating sustainable solutions that benefit Coloradans by enhancing their educational and employment opportunities.


Cris White

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Cris White is the Executive Director and CEO of the Colorado Housing and Finance Authority (CHFA), which has raised over \$35 billion to support affordable housing initiatives. CHFA invests in single-family mortgages for first-time homebuyers, multifamily units for low to moderate-income renters, and small businesses, stabilizing borrowing costs and preserving jobs. Additionally, Cris oversees the administration of Proposition 123 funds, helping the state achieve its affordable housing goals through innovative financing tools and programs.

IMPACT FINANCE CENTER TEAM

- Sarah Bosworth, Director of Alchemy
- Dr. Stephanie Gripne, CEO & Founder
- Dawn Rocky, Director of Strategy & Growth
- Nicole Bagley, Senior Advisor
- Rebecca Balter, Trustworthy Impact
- David Buchwald, Senior Advisor
- Andrew Crandall, Senior Fellow
- Andrew Currie, Senior Advisor
- Jessica Daniels, Senior Advisor
- Erika Seth Davies, Senior Advisor
- Karen Eller, Senior Advisor
- Chris Garvin, Senior Advisor
- Heather Gilker, Director of Family Office Initiative
- Leah Fischer, Director of Innovation & Partnerships
- Eileen Freiburger, Senior Advisor
- Alexis Halbert, Senior Advisor
- Jeanne Hegner, Senior Advisor
- Sarah Henderson, Senior Advisor
- Ruben Hernandez, Senior Advisor
- Holmes Hummel, Senior Advisor
- Taj James, Senior Advisor
- Colleen LaFontaine, Director of Women's Initiative
- Kerianne Leffew, Senior Advisor
- Tony Macklin, Senior Advisor
- Dr. Kelley Martin, Director of Education and Workforce Initiative
- Andrea McGrath, Senior Advisor
- Nico McCrossan, Senior Advisor
- Krissy Murillo-Vaio, Senior Advisor
- Sarah Aguirre Origer, Senior Advisor
- Carl Palmer, Senior Advisor
- Susanna Penfield, Trustworthy Impact
- Ebony Perkins, Senior Advisor
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- Christine Reichenbach, Senior Advisor
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- Praful Shah, Senior Advisor
- Greg Sherman, Senior Advisor
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- George Suttles, Senior Advisor
- Wendy Turman, Senior Advisor
- Katie Wallace, Senior Advisor
- Elynn Walter, Senior Advisor

And another 100+ Senior Advisors. Would you like to join the band? Reach out to us:
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To learn more or explore joining our board of
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