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IMPACTASSETS 50 2012 SERVES AS GATEWAY FOR INVESTORS SEEKING TO NAVIGATE THE GROWING IMPACT INVESTING SECTOR

IA 50 Comprises 50 Impact Investment Fund Managers Managing \$10.2 Billion In Assets

SAN FRANCISCO — October 2, 2012 — Today at SOCAP12, [ImpactAssets](#) released its annual [Impact Assets 50](#) (IA 50), a resource for advisors and investors seeking to respond to the growing demand for investment opportunities that deliver both financial and social or environmental returns. The IA 50 is a gateway to the impact investing space and is the first open-source, publicly published database of impact investment fund managers. This annual showcase gives the financial community a landscape view with respect to fund managers and assets under management, and is intended to illustrate the breadth of types of impact investment fund managers operating today. Fund managers included in this year's IA 50 manage a combined \$10.2 billion in assets within the impact investing market, a 15% growth over assets represented in the IA 50 last year.

“Impact investing is an enormous opportunity for people to not only get a return on their investments, but to also help make an impact on major societal needs at the same time, the two can go hand in hand,” said Jed Emerson, ImpactAssets’ Chief Impact Strategist and Chair of the ImpactAssets 50 Selection Committee. “ImpactAssets’ mission is to help investors and fund managers gain access to the resources they need in order to help people double the impact of their capital, and is why we produce the annual IA 50.”

Increasing demand and interest in impact investing is undeniable. The Calvert Fund recently [reported](#) that 72 percent of financial advisors express interest in offering impact investing products to their clients, while [surveys](#) commissioned by Deloitte Touche Tohmatsu show that 92 percent of millennials and 71 percent of business leaders agreed that the success of a business should be measured by more than profit. This illustrates that impact is something financial advisors should be considering now, given the growth of interest among investors, and particularly as millennials become recipients of familial wealth and start to deploy their own investment dollars.

The IA 50 illustrates the breadth of impact investment fund managers operating today: from firms with years of experience to newer players, from large asset managers operating within traditional investment organizations to smaller players specializing in impact investing, and from smaller and newer entities to those with scale. The IA 50 Selection Committee also represents this diversity of viewpoint comprising experts from JP Morgan, Calvert Foundation, McKinsey & Company, UBS, Tonic and Labrador Ventures.

"We've seen firsthand the growing interest in investments that have both financial and social ROI," said Selection Committee member Kathy Leonard, Vice President and Senior Portfolio Manager at UBS Financial Services. "Impact investing has emerged as the dominant global trend that will drive future financial market opportunities"

First announced by Genworth Financial Management Chair and ImpactAssets Board Member, Ron Cordes at the Clinton Global Initiative in 2010, an extensive application and review process of fund managers across the sector conducted each year produces the IA 50 list. In order to be considered for the IA 50 2012, fund managers needed to meet multiple criteria including having at least \$5 million in assets under management, more than three years experience with impact investing and demonstrated commitment to impact. The complete list of criteria can be found [here](#).

The IA 50 is a database meant for investors and advisors to conduct their own due diligence. It is not an index or investable platform and does not constitute an offering or recommend specific products. Financial Advisor Magazine is the official media partner for this year's IA 50 announcement.

About ImpactAssets

[ImpactAssets](#) is a nonprofit financial services firm that increases the flow of capital into investments that deliver financial, social and environmental returns. Its impact investment strategies, donor advised fund and knowledge resources provide a dynamic platform for wealth managers and the clients they serve to advance social or environmental change through investment. ImpactAssets seeks to shed light on and drive capital to the field's most promising organizations and initiatives, helping to build the field of impact investing.

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