



# SOCIAL IMPACT INVESTING

## Private Seminars



The Wells Foundation's seminars are based upon a combination of our own experience and that of other industry leaders. We use stories and examples for audience engagement, and support them with proven strategies participants can use to leverage social impact investing.

### Half Day Seminars (3 ½ hours each)

Below are our most popular seminars, designed to introduce the topic of social impact investing to various audiences. We can also design custom seminars based on the specific interests of a particular group or for other audiences. Please contact us to learn more.

#### Board Members:

Discover how impact investing can advance the mission of the nonprofits you serve. Topics covered include the funding opportunity; the impact investing ecosystem; changing foundation operations; program-related and mission-related investments; new legal structures; and getting started.

#### Foundations & Other Funders:

Learn the fundamentals of impact investing from the investor's perspective. Topics covered include how to set up an impact investing program; impact investing policy development; whether to use an intermediary or collaborate with other foundations; and the investment review process.

#### Nonprofit Leaders:

Discover how impact investing can advance your nonprofit's mission. Topics covered include changing foundation operations; using social impact investments to stabilize operations, grow, and develop new social enterprises; new legal structures; and protecting your nonprofit's tax status.

#### Wealth Managers/Advisors:

Learn how to support your clients who are interested in using impact investing to support nonprofits. Topics covered include industry trends; changing foundation operations; program-related and mission-related investments; and using social impact investments to stabilize operations, grow, and support new ventures.

### Facilitators



#### Tony Wells

*President, Tony R. Wells Foundation*

Tony Wells is a business veteran with 25 years of executive management experience as an entrepreneur, philanthropist, professional investor and board director.



#### Patrick Westerlund

*Education & Impact Investment Consultant, Tony R. Wells Foundation*

Patrick Westerlund leads the foundation's executive education program, conducts due diligence on impact investment opportunities, and collaborates on the development of portfolio social ventures.

### The Wells Foundation

The Wells Foundation is a Columbus-based private family foundation that was created in 2001. Pursuant to its mission to "create value for our community by developing stronger nonprofit leaders and investing in the next generation of social innovations," the foundation has spent nearly a decade investing into social enterprises, developing new social innovation models, and advising local nonprofit organizations that are considering social enterprise. The Wells Foundation regularly provides loans and lines of credit to nonprofits for operating needs and has provided the seed capital to fund numerous social enterprises.

## CONTACT:

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