

# Client Logo Here

## Executive Certificate on Impact Investing Day One

| Schedule and Timing | Description   | Location       |
|---------------------|---|----------------|
| 8:00 – 9:00 AM      | Breakfast   | SCU Facilities |
| 9:00 – 9:30 AM      | <b>WELCOME INTRODUCTIONS &amp; PROGRAM FORMAT</b>   | SCU Facilities |
| 9:30 – 10:50 AM     | <b>Module 1: THEORY OF CHANGE</b><br>Utilizing market mechanisms to build positive social and environmental impact<br>1.1 Why impact invest? What is impact investing?<br>1.2 Arc of the story- recent developments   | SCU Facilities |
| 10:50 - 11:00 AM    | <b>BREAK</b>  | SCU Facilities |
| 11:00 AM - 12:20 PM | 1.3 Survey: Families and impact investing<br>1.4 Sharing journeys: the stories of other impact investing families<br>1.5 Resources for an impact investor   | SCU Facilities |
| 12:20 - 1:30 PM     | <b>Lunch provided</b><br>No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.   | SCU Facilities |
| 1:30 – 2:05 PM      | <b>Module 2: A VALUE CENTRIC INVESTMENT STRATEGY</b><br>Filling out your impact investment policy primer:<br>2.1 What are your values and investment objectives?<br>2.2 What are your impact themes? (your domain of change)<br>2.3 What is your AUM allocation to impact investing (your change enablers)<br>2.4 Defining impact: How do you measure | SCU Facilities |
| 2:05 PM - 2:30 PM   | <b>Module 3: Target Asset Allocation Policy</b><br>Excel Workbook and in-class sharing session addressing:<br>3.1 What is your Target Asset Allocation % across asset classes?  | SCU Facilities |
| 2:30 PM - 2:40 PM   | <b>BREAK</b>  | SCU Facilities |
| 2:40 PM – 3:30 PM   | <b>Module 4: Constructing an Impact Investing Portfolio</b><br>Map out your impact investing policy -- Primer<br>Examine sample investment profiles and prospectus<br>4.1 Overview of Investment Options by Asset Classes<br>4.2 Light - Touch Engagements: investing with cash and fixed income  | SCU Facilities |
| 3:45 PM - 5: 30 PM  | <b>Welcome Reception</b>  | Adobe Lodge    |

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## Executive Certificate on Impact Investing Day Two

| Schedule and Timing  | Description   | Location       |
|--|---|----------------|
| 8:30 – 9:30 AM   | <b>Breakfast &amp; Discussion Groups</b>  | SCU Facilities |
| <b>9:30 AM – 12:30 PM</b><br><br><b>Facilitator:</b><br><br><i>Break: 10:15 – 10:45 AM</i> | <b>Module 4: Sourcing Investments</b><br><br>4.2 Light- touch engagements: investing with public equities<br>4.3 Moderate personal engagements: investing with structured notes funds, private equity funds, real asset/estate funds<br>4.4 High- Touch Engagements: direct private equity and real asset/estate investments <ul style="list-style-type: none"> <li>- Sourcing deals</li> </ul> | SCU Facilities |
| <b>12:30 - 1:30 PM</b>   | <b>Lunch provided</b><br><br>No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.   | SCU Facilities |
| <b>1:30 – 2:30 PM</b><br><br><b>Facilitator:</b>   | <b>Resume</b><br><br>4.4 High- Touch Engagements: direct private equity and real asset/estate investments <ul style="list-style-type: none"> <li>- Due diligence</li> <li>- structuring deal</li> <li>- Valuation</li> </ul>  | SCU Facilities |
| <b>2: 30 PM - 2:40 PM</b>  | <b>BREAK</b>  | SCU Facilities |
| <b>2:40 PM – 3:00 PM</b>   | <b>Resume (Continued)</b><br>4.4 High- Touch Engagements: direct private equity and real asset/estate investments <ul style="list-style-type: none"> <li>- Documentation</li> </ul>   | SCU Facilities |

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## Executive Certificate on Impact Investing Day Three

| Schedule and Timing           | Description   | Location       |
|-------------------------------|---|----------------|
| 8:00 – 9:00 AM<br>Pre-Program | Breakfast & Briefing  | SCU Facilities |
| 9:00 AM - 10:30 AM            | <b>Module 5: Measuring Impact</b> <ul style="list-style-type: none"> <li>- Challenges in the field</li> <li>- Output, outcome, impact framework</li> <li>- Application to fund and direct investments</li> </ul>                        | SCU Facilities |
| 10:30 AM - 10:40 AM           | BREAK   | SCU Facilities |
| 10:40 AM – 12:-00 PM          | <b>Module 6: Post Investment Support</b> <ul style="list-style-type: none"> <li>- What happens after you make a direct investment</li> <li>- Tales from the field</li> </ul>  | SCU Facilities |
| 12:00 PM - 1:00 PM            | <b>Lunch provided</b><br><br>No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.   | SCU Facilities |
| 1:00 PM - 2:00 PM             | <b>Module 7: Taking Action</b> <ul style="list-style-type: none"> <li>- What have you learned?</li> <li>- How have you planned to use this course?</li> <li>- Revisit Impact investing policy and excel allocation strategy?</li> </ul> | SCU Facilities |
| 3:30 PM - 6:30 PM             | Wine & Cheese Reception   | Adobe Lodge    |

**SILICON VALLEY EXECUTIVE CENTER**  
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