ACTIVATING YOUR INVESTMENTS FOR IMPACT
A Course for Individuals

More than ever, individuals are looking for opportunities to make a difference in their communities, the environment, and the issues they care about. A concrete way to do that is by activating their investments for positive social and environmental impact.

While there are numerous resources and networks for institutional investors interested in maximizing the social and environmental impact of their investment portfolios, individual and retail investors who also want to make a difference through their investments lack similar kinds of tools and resources. From climate change to human rights, funds and products exist, but a major barrier is education and awareness about how individuals can begin shifting investments into these higher impact opportunities.

Croatan Institute is seeking sponsorship partners to support the development of a new course for individual investors, “Activating Your Investments for Impact.” The online course will educate individual investors on how to create impact across multiple asset classes and investment themes through a series of video modules.

These modules will provide practical steps investors can take on their own or with their financial advisor, as well as a deeper understanding of how unique opportunities in each asset class present different environmental or social impacts. The course will be structured as a combination of presentations, interviews, and case studies. Course modules will be made available through a “freemium” model, with free limited content available to the general public, and the fuller course for paid subscribers. Additionally, opportunities will be developed for organizations to license the course materials for their clients and members.

Sponsorship gives mission-aligned partners recognition before the course is launched, during the launch events, and through the course presentations and online materials. Please join us in creating this invaluable resource to help investors—both retail and high net worth—learn how to activate their investments for impact.

http://activateforimpact.org

SPONSORSHIP OPPORTUNITY

Your support is vital to creating this needed resource.

Contact Christi Electris to discuss becoming a sponsor:
christi@croataninstitute.org
# ACTIVATING YOUR INVESTMENTS FOR IMPACT

## SPONSORSHIP BENEFITS*

<table>
<thead>
<tr>
<th></th>
<th>TITLE SPONSOR $10,000</th>
<th>MODULE SPONSOR $5,000</th>
<th>PARTNER $2,500</th>
<th>SUPPORTER $1,000</th>
<th>FRIEND $500</th>
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</thead>
<tbody>
<tr>
<td># of free online registrations</td>
<td>50</td>
<td>25</td>
<td>8</td>
<td>4</td>
<td>2</td>
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<tr>
<td># of discounted online registrations</td>
<td>50</td>
<td>25</td>
<td>10</td>
<td>6</td>
<td>3</td>
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## PRE-COURSE RECOGNITION

<table>
<thead>
<tr>
<th>Feature</th>
<th>Title Sponsor</th>
<th>Module Sponsor</th>
<th>Partner</th>
<th>Supporter</th>
<th>Friend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media promotion</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Website (name or logo)</td>
<td>LARGE LOGO</td>
<td>MEDIUM LOGO</td>
<td>SMALL LOGO</td>
<td>NAME</td>
<td>NAME</td>
</tr>
<tr>
<td>Email blasts</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sneak-peak of materials opportunity for feedback</td>
<td>*</td>
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</tbody>
</table>

## RECOGNITION AT COURSE LAUNCH EVENT(S)* (IN-PERSON/ONLINE)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Title Sponsor</th>
<th>Module Sponsor</th>
<th>Partner</th>
<th>Supporter</th>
<th>Friend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listing of sponsor included in materials</td>
<td>LARGE LOGO</td>
<td>MEDIUM LOGO</td>
<td>SMALL LOGO</td>
<td>NAME</td>
<td>NAME</td>
</tr>
<tr>
<td>Description of sponsor included in handouts</td>
<td>*</td>
<td>*</td>
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<tr>
<td>In-person/virtual greeting</td>
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</tbody>
</table>

## ONLINE COURSE RECOGNITION

<table>
<thead>
<tr>
<th>Feature</th>
<th>Title Sponsor</th>
<th>Module Sponsor</th>
<th>Partner</th>
<th>Supporter</th>
<th>Friend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name listed in credits</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Logo included in credits</td>
<td>LARGE LOGO</td>
<td>MEDIUM LOGO</td>
<td>SMALL LOGO</td>
<td>NAME</td>
<td>NAME</td>
</tr>
<tr>
<td>Logo on inaugural course materials</td>
<td>LARGE LOGO</td>
<td>MEDIUM LOGO</td>
<td>SMALL LOGO</td>
<td>NAME</td>
<td>NAME</td>
</tr>
<tr>
<td>Support production of one video module</td>
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<tr>
<td>Intro as program sponsor for all modules</td>
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Detailed sponsorship opportunities*

Title Sponsor - $10,000
- 50 free and 50 discounted online registrations
- Pre-course recognition
  - Social media promotion as sponsor
  - LARGE logo recognition as sponsor in email advertisements and course website
  - Sneak-peak of course materials with opportunities for feedback prior to course launch
- Recognition at course launch event(s)
  - Recognition in materials with LARGE logo
  - Description of sponsor included in launch materials
  - In-person/virtual greeting during launch event(s)
- Online course recognition
  - Name and LARGE logo in credits
  - LARGE logo on inaugural course materials
  - Introductory listing as a program sponsor in all video modules.

Partner - $2,500
- 8 free and 10 discounted online registrations
- Pre-course recognition
  - Social media promotion as sponsor
  - SMALL logo recognition as sponsor in email advertisements and course website
- Recognition at course launch event(s)
  - Recognition in materials with SMALL logo
  - Description of sponsor included in launch materials
- Online course recognition
  - Name and SMALL logo in credits
  - SMALL logo on inaugural course materials

Supporter - $1,000
- 4 free and 6 discounted online registrations
- Pre-course recognition
  - Social media promotion and recognition on course website as sponsor
- Recognition at course launch event(s)
  - Recognition in materials with name
- Online course recognition
  - Name included in credits

Friend - $500
- 2 free and 3 discounted online registrations
- Pre-course recognition
  - Social media promotion and recognition on course website as sponsor
- Recognition at course launch event(s)
  - Recognition in materials with name listed
- Online course recognition
  - Name included in credits

Other sponsorship opportunities
- We are happy to discuss developing a sponsorship package that better meets your needs. Please reach out to us.

*The precise scope of work will vary based on the total sponsorship funding raised.

Founders Circle members receive an exclusive 10% discount to sponsorship.
Learn more about becoming a member of the Croatan Institute Founders Circle:
www.croataninstitute.org/founderscircle