

EXHIBIT 1: DEDICATED GENDER LENS INVESTMENT OPPORTUNITIES



IMPACT INVESTING
WITH A GENDER LENS

	PRIVATE	PUBLIC
EQUITY	<p>astarteventures <i>Venture Capital, Women's Health</i></p> <p>EXCLAIM CAPITAL PARTNERS <i>Venture Capital, Women's Health</i></p> <p>Golden Seeds <i>Angel investing, Women-Led Startups</i></p> <p>OXFAM America <i>WISE Women's Empowerment Fund, Women-Run Small Enterprises in Latin America</i></p> <p>Springboard ENTERPRISES <i>Venture Capital, Women-Led Startups</i></p>	<p>aperio <i>Women Inclusion Portfolio, US & Global Equities</i></p> <p>Makeda Capital, LLC <i>Makeda Fund, L.P. Women-Led Companies, U.S. Equities</i></p> <p>Morgan Stanley <i>The Parity Portfolio, U.S. Equities</i></p> <p>nia global solutions <i>Innovative Small/Mid Cap Companies Supporting Gender Diversity Global Equities</i></p> <p>PAX ellevate <i>Global Women's Index Mutual Fund, Global Equities</i></p> <p>U.S. TRUST Bank of America Private Wealth Management <i>Women & Girls Equality Strategy, U.S. Equities</i></p>
FIXED INCOME	<p>rootcapital <i>POWERING FINANCE FOR RURAL COMMUNITIES Women in Agriculture Initiative, Promissory Note</i></p> <p>SELF HELP CREDIT UNION <i>Women & Children's Certificate of Deposit</i></p> <p>WINWIN A PROJECT OF CALVERT FOUNDATION <i>Women Investing in Women Initiative, Promissory Note</i></p>	<p>BARCLAYS <i>Women in Leadership Exchange, Traded Notes - value linked to U.S. Equities</i></p> <p>Breckinridge CAPITAL ADVISORS <i>Gender Lens Mandate Portfolio, U.S. Bonds</i></p> <p>COMMUNITY CAPITAL MANAGEMENT <i>Revitalizing America U.S. Government & Agency Bonds, Capital and Services to Women</i></p>
CUSTOMIZED PORTFOLIOS	<p>ImprintCapital</p> <p>VERIS Wealth Partners Values. Wealth. Sustainability.</p>	

EXHIBIT 2: GENDER LENS INVESTING INCORPORATES MULTIPLE CRITERIA

INVESTMENT OPPORTUNITIES	PRODUCTS	WOMEN'S LEADERSHIP	ACCESS TO CAPITAL	PRODUCTS & SERVICES	WORKPLACE EQUITY	SHAREHOLDER ENGAGEMENT/ POLICY WORK
 BARCLAYS	Exchange Traded Note	✓				
 Makeda Capital, LLC	Public Equities	✓				
Morgan Stanley	Public Equities	✓				✓
PAX  ellevest	Equity Mutual Fund	✓			✓	✓
 Golden Seeds	Angel Investing	✓	✓			
 Springboard ENTERPRISES	Venture Capital	✓	✓			
 OXFAM America	Venture Capital	✓	✓			
 COMMUNITY CAPITAL MANAGEMENT Enduring Assets	Bond Mutual Fund		✓	✓		
EXCLAIM CAPITAL PARTNERS	Venture Capital	✓	✓	✓		
astarte ventures	Venture Capital	✓	✓	✓		
SELF HELP CREDIT UNION	Certificate of Deposit	✓	✓	✓		
 WINWIN A PROJECT OF CARVER FOUNDATION	Private Debt	✓	✓	✓		
 rootcapital POWERING FINANCE FOR RURAL COMMUNITIES	Private Debt	✓	✓	✓		
 Breckinridge CAPITAL ADVISORS	Public Bonds	✓	✓	✓	✓	
 mia	Public Equities	✓	✓	✓	✓	✓
aperio	Public Equities	✓	✓	✓	✓	✓
U.S. TRUST  Bank of America Private Wealth Management	Public Equities	✓	✓	✓	✓	✓
 ImprintCapital	Gender Lens Portfolios	✓	✓	✓	✓	✓
 VERIS <small>Wealth Partners</small>	Gender Lens Portfolios	✓	✓	✓	✓	✓

APPENDIX A



IMPACT INVESTING
WITH A GENDER LENS

Detailed Map of the Field

Organizing People and Organizations	
Foundations and philanthropies	Wallace Global Fund, Dallas Women's Foundation, Eileen Fisher Community Foundation, International Women's Media Foundation (IWMF), Calvert Foundation, Women's Foundation of California, Nike Foundation, H&M Conscious Foundation, The Women's Foundation Hong Kong, Global Fund for Women, Ewing Marion Kauffman Foundation, Stitching Doen (Foundation), Living Future Foundation, Women's Foundation of Southern Arizona, Imagio Dei Fund, Weissberg Foundation, Thomson Reuters Foundation, Hunt Alternatives, Ford Foundation, Oak Foundation
Networks of women entrepreneurs	SheEO, Astia, Women Who Code (WWCode), Dell Women's Entrepreneurship Network
Networks of financial service providers	Global Alliance for Banking on Values, Global Impact Investing Network (GIIN), 100 Women in Hedge Funds, Association for Enterprise Opportunity (AEO), National Women's Business Council (NWBC), Women's World Banking, Women Effect, Asian Venture Philanthropy Network (AVPN), Women in Social Finance, Springboard Expert Network, The Forum for Sustainable and Responsible Investment (US SIF/US SIF Foundation),
Networks of organizations working on gender issues	Association for Women's Rights in Development (AWID), International Association for Feminist Economists, The Thirty Percent Coalition, Catalyst, Private Equity Women Investor Network, Spark, Girls in Tech, Global Banking Alliance for Women, Women Investing for a Sustainable Economy (WISE)
Philanthropic and funding networks	Women's Funding Network, Women Donors Network, Women Moving Millions, Confluence Philanthropy, Aspen Network of Development Entrepreneurs (ANDE), Kiva, the Business Alliance for Local Living Economies (BALLE), Slow Money, Transform Finance, PYMWYMIC, Philanthropy Indaba, Inspired Philanthropy
Conferences	Social Capital Markets (SOCAP), Sankalp Forum, Opportunity Collaboration, Oxford Power Shift Forum for Women in the World Economy, Confluence Philanthropy, Trust Women Conference, Dell's Women's Entrepreneurship Network, Asia-Pacific Economic Cooperation High-Level Policy Dialogue on Women and the Economy, Asian Venture Philanthropy Network (AVPN), She's Geeky, Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) by the UN General Assembly, Beijing Declaration and Platform for Action by the UN, African Women's Economic Summit, Female Founders Conference, the Women's Private Equity Summit, Women's Funding Network Conference, Women Donors Network Conference, Trust Women Conference by Thomson Reuters
Organizing Ideas	
Media platforms	Thomson Reuters, Impact Alpha (formerly Impact IQ), Bloomberg News, WAMC (51% Radio Show), Unreasonable Group
Non-governmental organizations working on gender issues	Oxfam, Women Organizing for Change in Agriculture and Natural Resource Management (WOCAN), UN Women, OECD, CARE International, Women Deliver, Global Alliance for Clean Cookstoves, Technoserve, The Peace Company, American Civil Liberties Union (ACLU), Count Me In For Women's Economic Independence, WomanCare Global, Madre, New Faces New Voices



Business schools	The Wharton School's Wharton Social Impact Initiative (WSII), University of Michigan's Ross School of Business, Rotman School of Management at the University of Toronto, Saïd Business School at the University of Oxford, Simmons College School of Management (SOM)
Gender research organizations	International Center for Research on Women (ICRW), Wellesley Centers for Women, Re:Gender, Criterion Institute, Babson College's Center for Women's Entrepreneurial Leadership, Initiative for Responsible Investment at the Hauser Center for Civil Society at Harvard University, World Council of Peoples for the UN, Catalytic Women
Consulting firms and capacity building orgs	Monitor Deloitte, Enclude, Value for Women, SustainAbility, Strategy& (formerly Booz & Co.), Catalyst at Large, Infinitely Possible Financial Coaching, Dalberg Global Development Advisors, Exemplar Companies, DCProject, Dietel Partners, Iva Kaufman Associates, Imagine Philanthropy, TRUZU, SVT Group, Women Gathering Project, Pique Ventures
Policy setting organizations	US SEC, Australian Stock Exchange (ASX)
Organizing Investment Activity	
Accelerators, incubators, and trainings	SheEO, Pipeline Fellowship, SPRING, Village Capital Incubator, Unreasonable Institute, Prosperity Collective, Women's Enterprise Center, Global Invest Her, Agora Partnerships, Prosperity Catalyst, Coca Cola's 5by20 Initiative, Springboard Enterprises
International development agencies	USAID, DFAT (Australia), DFID, Grand Challenges Canada, European Bank for Reconstruction and Development (EBRD), GIZ (Germany), Chemonics International
Development finance institutions	IFC, IDB, OPIC, World Bank, EBRD, ADB
Ratings, indexes and certification programs	GIIRS, B Lab, Global Reporting Initiative (GRI), CDFI Assessment and Ratings System (CARS), Impact Reporting and Investment Standards (IRIS), EDGE, We Connect, Fairtrade International, Gender Global Entrepreneurship and Development Index/Female Entrepreneurship Index by Dell and Global Entrepreneurship and Development Institute, Barclays Women in Leadership Index and ETN, Pax Ellevest Global Women's Index Fund
Investment banks and capital marketplaces	Goldman Sachs, Morgan Stanley, Barclays, Daiwa Securities Group, Mission Markets
Investment managers and funds	Calvert Foundation (including WIN-WIN), Root Capital, Pax World/Pax World Funds/Pax World Management, Texas Women Ventures, Oxfam's WISE Fund, Honeybee Capital, Community Capital Management, EXXclaim Capital, Astarte Ventures, Sankhya Fund/Sankhya Private Partners, Breckinridge Capital Advisors, Honeybee Capital, Village Capital, Lotus Impact, Enclude (Triodos Facet and Shorebank International), Gray Matters Capital, ImpactAssets, Domini Social Investments, Trillium Asset Management, Pique Venture Investments, Aperio, Makeda Capital, Nia Community Fund, Boston Common Asset Management, Earth Asset Partnership, Invested Development, Vodia Ventures, Female Founders Fund, Small Enterprise Assistance Funds (SEAF)
Investment advisors and wealth managers	Veris Wealth Partners, Imprint Capital, U.S. Trust, Sapers & Wallack, Chanel Family Assets, Silver Bridge Advisors (now bought by Banyan Partners), Busara Advisors, Cambridge Associates, Morgan Stanley Wealth Management
Banks and credit unions	Vancouver City Savings Credit Union (Vancity), Self-Help Federal Credit Union
Angel networks	Investors' Circle, Golden Seeds, Astia Angels, 37 Angels, JPH Associates, ClearlySo Angels
Crowd funding platforms	Catapult, MoolaHoop

Beyond Our Borders
Gender Lens Investment Committee
Resource list
August 2017



1. *Gender Lens Investing*, by Jackie VanderBrug and Joseph Quinlan, John Wiley & Sons, Inc. 2017
2. Jacki Zehner, 400 reports to support gender lens giving and investing, <http://www.jackizehner.com/2017/03/08/the-evidence-is-in-400-reports-to-support-gender-lens-giving-and-investing/>
3. UN Women's Empowerment Principals, [http://www.un.org/en/ecosoc/newfuncnt/pdf/womens empowerment principles ppt for 29 mar briefing-without notes.pdf](http://www.un.org/en/ecosoc/newfuncnt/pdf/womens%20empowerment%20principles%20ppt%20for%2029%20mar%20briefing-without%20notes.pdf)
4. Thirty Percent Coalition, <https://www.30percentcoalition.org/>
5. Veris Wealth Partners, *Women, Wealth & Impact: Investing with a Gender Lens 2.0*, [http://www.veriswp.com/wp-content/uploads/2015/03/CA Women-Wealth-and-Impact-2.0 2015-03-05.pdf](http://www.veriswp.com/wp-content/uploads/2015/03/CA_Women-Wealth-and-Impact-2.0_2015-03-05.pdf),
6. Criterion Institute: *Blueprint for Women's Funds*, <https://criterioninstitute.org/blueprint/>, gender lens investing webinars <https://criterioninstitute.org/gender-work/gender-lens-investing-webinars/>, *State of the Field of Gender Lens Investing, Review and Roadmap*, <http://criterioninstitute.org/wp-content/uploads/2012/06/State-of-the-Field-of-Gender-Lens-Investing-11-24-2015.pdf>
7. Women's Funding Network, <http://www.womensfundingnetwork.org/>
8. US Trust, gender lens investing, <http://www.ustrust.com/ust/pages/ArticleViewer.aspx?Title=Women-and-Girls-Equality-Strategy>
9. Pax World Investments, GLI [http://paxworld.com/system/storage/19/72/f/5033/ge as an ic.pdf](http://paxworld.com/system/storage/19/72/f/5033/ge%20as%20an%20ic.pdf)
10. Capital Sisters International, www.capitalsisters.org
11. Impact Finance Center, <http://www.impactfinancecenter.org/>
12. Morningstar 2 Options for Gender-lens investing, <http://news.morningstar.com/articlenet/article.aspx?id=796414>
13. USSIF, *Investing to Advance Women, A Guide for Individual and Institutional Investors*, [http://www.ussif.org/Files/Publications/SRI Women F.pdf](http://www.ussif.org/Files/Publications/SRI_Women_F.pdf)
14. CO General Assembly passes resolution promoting gender representation on corporate boards, <http://www.businesswire.com/news/home/20170308006471/en/General-Assembly-Passes-Resolution-Promoting-Equitable-Gender>
15. Thomson Reuters Diversity and Inclusion Index, <http://financial.thomsonreuters.com/en/products/data-analytics/market-data/indices/diversity-index.html>
16. Adrian Dominican Sisters broadcast on how to vote proxies, <http://www.adriandominicans.org/News/TabId/341/PostId/1277/shareholders-urged-to-vote-proxies-to-influence-corporate-decisions.aspx>
17. Rockies Venture Club Women Investment Network, Barbara Bauer, <http://www.rockiesventureclub.org/events/can-women-angel-investors/>
18. Next Wave Angel Ventures, Alicia Robb, <http://nextwave.ventures/>
19. Mergelane, <http://mergelane.com/about>
20. SheEo, <http://www.sheeo.world/events/2016/8/22/and-radicalgenerosity-comes-to-colorado>