

# The Social Blueprint Toolkit: SBP Fund Executive Summary Template

December 2013, **Version 1.1**



This work is licensed under the Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License. To view a copy of this license, visit [http://creativecommons.org/licenses/by-nc-sa/4.0/deed.en\\_US](http://creativecommons.org/licenses/by-nc-sa/4.0/deed.en_US).

**Jorge Calderon**

Managing Director, Impact Strategy Advisors



**Executive Summary: XXX**  
XXX

Logo

**Investment Approach**

**Uniqueness**

**Strategic Partnerships**

**Management Team**

**Advisors**

We welcome comments and suggestions:  
**[socialblueprint@impactstrategyadvisors.com](mailto:socialblueprint@impactstrategyadvisors.com)**

# Impact

## Strategy Advisors

Strategy | People Capital | Investments

Increasingly, businesses are addressing their stakeholders interest in aligning purpose with their investments, brands, neighborhoods and workers. Our firm was developed to support operators, policy makers, academics, foundations and capital providers in this market evolution towards a “Purpose Economy.”

Impact Strategy Advisors (ISA) is a San Francisco based impact management and investment consulting firm. As the premier US advisor for the purpose economy, we exclusively partner with clients whose organization blends strong commercial fundamentals with authentic social and/or environmental values.

Through our three integrated professional services; **strategy analytics, executive recruiting and investment management**, we provide our clients with the breadth of tools and the depth of knowledge needed to solve their most critical needs. We view each of our clients as partners and continually invest time in understanding their people, processes and expectations. We believe this helps our engagements be appropriately customized, which leads to the best possible outcomes.

Our talented staff have expertise in a variety of impact theme areas including; education, youth development, economic development, entrepreneurship, diversity, job creation, poverty alleviation, technology for change and the field of impact investing.

While our client engagement objectives are varied, examples include; analyzing lines of business for large social enterprises, designing earned income programs for large social non-profits, developing impact investment strategies for family offices, sub-advising for established funds, hiring investment executives for impact funds and their portfolio companies, advising on new economic development public policy, creating opportunity landscapes for investors, developing knowledge primers for wealth management groups and their clients, and doing diligence of investors or grantors.

### Driven By Our Values

#### Discover

Listen, reflect and share

#### Empathize

Consider others

#### Empower

Invest in people

#### Excel

Be accountable

#### Innovate

Create with passion