



For Immediate Release

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National Experts on Impact Investing Gather in Calgary for the 4th Annual Capital for Cause Impact Investing Summit

Calgary, Alberta - It might seem surprising that in the heart of Canada's conservative energy sector, leading experts on Impact Investing will be gathering. But if you look closely, the conversations around impact and diversification are not too dissimilar. Impact Investing isn't just about green-tech and clean-tech. Capital for Cause showcases a variety of ways that you can make money and do good at the same time. Learning from one of Canada's first investors in a Social Impact Bond, Andreas Souvaliotis; connecting with family foundations who aligned their investment strategy with their philanthropic objectives; sharing lessons learned about Angel Investing in Canada's burgeoning tech sector are just some of the ways that participants will explore the area of Impact Investing.

On November 16th, Calgary will play host to leading experts on a variety of issues around Impact Investing. Capital for Cause, a summit of Karma & Cents Inc. was started four years ago in an effort to provide relevant and accurate information to family foundations, portfolio managers, investors and financial advisors on integrating social purpose with investment portfolio growth.

Designed for both advisors, individuals and foundations in mind, Capital for Cause provides practical, actionable advice and opportunities for participants to share their knowledge and experiences.

We are excited by the growth of interest and activity in the impact investing sector, which has doubled in size from \$114 billion in global assets under management in 2016 to \$228 billion in 2017," says Marie Ang, Manager at SVX. "A report released by SVX earlier this year found that 90% of Canadian high net worth individuals show some level of interest in impact investing, which presents a remarkable thirst for opportunities right here at home."

This year Capital for Cause will focus on 'Stories from the Trenches.' Presenters representing different perspectives of the Impact Investing world from Social Impact Bonds, to investing in First Nations businesses, to contributing to local investment funds to seed capital and venture funding.

Asking the tough questions around Impact Investing:

- What happens when positive social impact for one community is directly tied to the energy industry, yet large institutions are divesting from that sector?
- Balancing traditional financial risk of new technologies in contrast with the potential social change on the upside?
- How can you measure impact at early stage or seed stage businesses?
- Are there ways to leverage investments to accelerate growth and mitigate risks?

"I'm excited to be a part of Capital for Cause representing the Active Impact Investments team and talking about investing at the seed stage," says Mike Winterfield, President of Active Impact Investments, "We are often asked how you can measure impact at such an early stage and we will look forward to sharing our thoughts along with how to engage in early-stage businesses to accelerate growth and reduce failure."



Capital for Cause Event Details:

Location: Hotel Blackfoot, 5940 Blackfoot Trail SE, Calgary, AB

Date: November 16th from 8am until noon.

Tickets: Purchased by visiting www.KarmaAndCents.com.

This event has been made possible by the generosity of our sponsors and partners:

- Genus Capital
- Calgary Economic Development
- Investors Group
- Cidel
- Carrot Rewards
- SVX
- Active Impact Fund
- REAP Calgary
- Hotel Blackfoot
- Good Company

Making money and doing good is not a straight line and the ripple effect sometimes leads to unintended consequences. Capital for Cause explores these challenges and fosters discourse amongst the participants.

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About Karma & Cents Inc.:

[Karma & Cents](http://www.KarmaAndCents.com) works with families, family offices and their advisors as they bridge the gap between traditional philanthropy and Philanthropy 3.0. We believe that by providing tools and resources to philanthropists and their advisors some of these complex social problems can be solved in our lifetime.

About the Capital for Cause speakers:

Keynote Speaker: Andreas Souvaliotis, Founder & CEO [Carrot Rewards](http://www.CarrotRewards.com)

Serial social entrepreneur Andreas Souvaliotis was the founder of the world's first eco-rewards program and, more recently, the world's first public wellness rewards initiative in partnership with the Government of Canada. He has been recognized globally for his achievements in influencing and rewarding behavior change on a mass scale. A prolific writer and public speaker, Andreas is a prominent Canadian thought leader and advocate for innovative approaches to social change, particularly in the areas of public health promotion, climate change awareness and citizenship.

About our Panelists:

Keith Martell, CEO - [First Nations Bank of Canada](http://www.FirstNationsBankofCanada.com) - A chartered bank offering a full range of personal and business banking services – with a primary focus on Indigenous customers. Keith will share what impact investing looks like from our First Nation's perspective and how we can best integrate this emerging market into our financial strategy.

Mike Winterfield, CEO & Fund Manager - [Active Impact Investments](http://www.ActiveImpactInvestments.com) directs funds and talent to companies that are making a difference. Investing in early-stage social ventures, these private companies are innovating to solve important social and environmental issues alongside superior profits.

Erin Poeta, Manager - [Local Investing YYC](http://www.LocalInvestingYYC.com) - Keeping your dollars local by investing in businesses you care about that are doing good right here in Calgary. A new impact investment cooperative provides everyday investors, the opportunity to use RRSP and TFSA eligible shares.



Marie Ang, Manager - [Social Venture Exchange](#) - A platform for raising impact capital and making impact investments. SVX is an impact investing platform for ventures, funds and investors seeking social and/or environmental impact alongside the potential for financial return. It provides a single access point for raising capital and making investments through our in-person engagement and online tools.

JP Harrison, President - [Genus Capital](#) - A boutique wealth management firm, Genus Capital designs customized investment portfolios balancing Environmental, Social and Governance values. In a province where our history and wealth are inextricably tied to the energy sector, how do we balance our historical roots with new attitudes towards investing? Genus Capital meets investors where they are at on the impact spectrum aligning values with investments and honouring the past.