

IMPACT LEADERS

Next Generation

Context

The generation on the rise today is more focused on climate change and social inequality than their parents and grandparents were. They're questioning their family's role in creating – and solving – these societal challenges. At the same time, they hold strong loyalty to their families and to preserving the family wealth.

Given that context, the Next-Gens (from Spain and Latin America) are interested in learning the main concepts and approaches of impact investing and trust-building toward investment opportunities.

From Fi, we are launching the **Impact Leaders** experience, which will enable Next-Gens to be inspired, learn concepts and tools, and find the partners they need to embark on their impact investment journey.



About Fi

Fi is an international platform that promotes and facilitates the mobilization of capital towards a positive impact in European and emerging countries. Fi is powered by Social Nest Foundation, a Spanish organization with over a decade of experience promoting, guiding and supporting entrepreneurs, investors, and other actors to create solutions to the world's most pressing challenges.

Goal

To offer to the Next-Gens from Spain and Latin America a unique experience navigating the diverse strategies of impact investing to align capital with values while preserving family wealth.

Framework

March 2024

First Workshop

"Aligning Capital With Values"

May 2024

Second Workshop

"Building My Path As An Impact Investor"

September 2024

Third Workshop

"Investing With Impact Across Different Asset Classes"

Online tracking



Price

The First Workshop is by invitation only, so there is no participation fee. However, we kindly request that those who register be able to participate for the entire day. The Second and Third Workshops have a total cost of 1,200 €.

First Workshop

The First Workshop "Aligning Capital With Values" aims to inspire and educate Next-Gen investors on impact investment strategies. The program agenda includes exploring cases of entrepreneurs and impact investors who are transforming the world, as well as a guide on aligning capital with values.

Second Workshop

The Second Workshop, "Building My Path As An Impact Investor", is focused on sharing the tools you need as a Next-Gen impact investor to integrate impact investment strategies, analyze investment opportunities, and find the right partners to maximize the effectiveness of your investments.

Third Workshop

The Third Workshop "Investing With Impact Across Different Asset Classes" is focused on learning to invest with impact across different asset classes, and under various expectations of impact and return.

Online tracking

All Workshops include an online tracking that involves guidance from the Social Nest team and/or partners to assist participants in their journey as impact investors.

For participants with a tax base in Spain, the investment will be considered a donation in favor of the Social Nest Foundation, with the corresponding tax benefit in favor of the participant*.

*For more information, contact our team directly: monica@socialnest.org.

Methodology

+ Training

The program will take a comprehensive approach to training, combining expert-led sessions with practical and immersive content delivered by prominent international experts from the impact investing industry. This will ensure participants get valuable insight and knowledge directly from industry professionals, enhancing their understanding of key concepts and best practices

+ Experiential

The goal of the program is to give participants a transformative experience. Through its various interactive sessions and activities, participants will get the unique opportunity to engage with experienced next-generation representatives, financial advisors and family members actively involved in the impact investing industry. Thanks to this first-hand exposure, participants will gain practical insight, learn from real-life examples and better understand the nuances of impact investing.

+ Hands-on

To foster practical learning and skill development, the program will include on-site exercises specifically designed to equip participants with the tools and techniques needed to align capital with values, to effectively manage family wealth responsibilities and to perform a thorough impact investing analysis. These hands-on exercises will enable participants to apply their learning in a practical context, thus enhancing their ability to make informed investment decisions.

+ Networking

One essential aspect of the program is to facilitate meaningful connections and networking opportunities. Participants will get the chance to interact and collaborate with like-minded peers who share a passion for impact investing. Through structured networking events and ongoing community-building initiatives, participants will be able to establish an active and supportive network of impact leaders, fostering long-term collaborations and knowledge sharing.

The methodology explained above highlights the comprehensive approach to training, its experiential nature, the hands-on learning component, and networking opportunities, thus ensuring participants have a holistic and impact-full experience in the field of impact.

PARTNERS

Fi Impact Experience is a program led by Social Nest Foundation, in partnership with top-tier, international impact investing entities such as:



An academic research and teaching institution of the Department of Banking and Finance at the University of Zurich. They position themselves at the intersection of research and education, bringing together scientists, asset owners and investment professionals to generate knowledge and mobilize capital for impact.



A global community of family members committed to aligning their assets with their values. Its purpose is to improve the likelihood and speed of solving social and environmental problems by increasing the flow of capital into investments that generate measurable impact.



Latimpacto is an ecosystem builder that stands out for increasing the flow of human, intellectual and financial capital for impact in Latin America and the Caribbean. They are a network of peers with a clear sense of community, who build collaborations, learning opportunities and connections along the capital continuum.

Program First Workshop

"Aligning Capital With Values"

March 13, 2024

Madrid

Time	Type of content	Session	Specific content	Speakers
2:00-3:00 pm	Welcome Lunch			
3:00-3:30 pm	Training. Panel followed by a round of Q and A	Impact Investing 101 <i>In presence. In Spanish</i>	<ul style="list-style-type: none"> • What is impact investing? • Why impact investing? • How is different from sustainable finance? • Are both strategies alongside the same spectrum? 	<ul style="list-style-type: none"> • Juliane von Boeselager, Investor Relations Manager, FASE • Pedro Javier Armentia, Cofounder, Creas • Monica Vasquez Del Solar Social Nest Foundation. Moderator
3:30-3:50 pm	Experiential	Meeting an Impact-driven Company <i>In presence. In Spanish</i>	<ul style="list-style-type: none"> • The journey of an impact driven entrepreneur 	<ul style="list-style-type: none"> • Constanza Pinto, COO & Co-Founder, Orygen • Natalia Valle, CEO & Co-founder, Plant on Demand • Iñigo Eguía, Social Nest Foundation. Moderator
3:50-4:15 pm	Break			
4:15-4:45 pm	Experiential	Aligning Capital with Values from a Next Gen Perspective <i>Online. In English</i>	<ul style="list-style-type: none"> • What kind of internal question should I ask? • How can I use our resources most effectively to address the social and environmental issues we care most deeply about? • Am I prepared for impact investing? • How can I navigate family dynamics? 	<ul style="list-style-type: none"> • Sam Bonsey, Co-Founder & Executive Director, The ImPact • Margarita Albors, Social Nest Foundation
4:45-5:15 pm	Training. Panel followed by a round of Q and A	Private Banking, Wealth Advisors and Impact Investing <i>In presence. In English</i>	<ul style="list-style-type: none"> • How is the industry of wealth management involved in impact investing? 	<ul style="list-style-type: none"> • Armando Fandos, Wealth Management Director, Zubi Wealth • Pablo Alonso, Founder & President, Eurocapital Advisors • Juan Vilarrasa, Head Private Bank, Barclays • Monica Vasquez Del Solar Social Nest Foundation. Moderator
5:15-6:00 pm	Experiential	Sharing Experiences of Next Gen Impact Investors <i>In presence. In Spanish</i>	<ul style="list-style-type: none"> • Why did you start the path of impact investing? • What kind of projects are you investing in? • How do you engage family or financial advisors on impact investing? • How do you value your experience as impact investor 	<ul style="list-style-type: none"> • Miguel de Ros, Next-Gen Impact Investor • Omar Ynzenga, Next-Gen Impact Investor
6:00-6:10 pm	Closing			

*All the Speakers will be confirmed shortly.