



# CLEAN PORTFOLIO PROJECT

## SPONSORSHIP OPPORTUNITIES

[www.cleanportfolio.org](http://www.cleanportfolio.org)

@CleanPortfolio



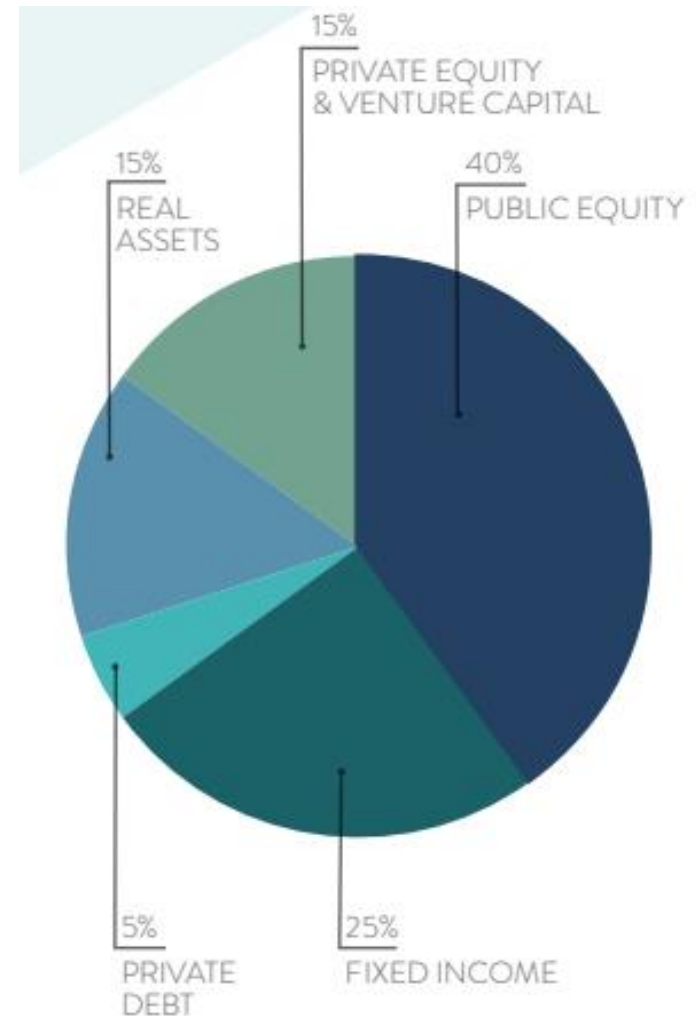
- The **Clean Portfolio Project** is developing total portfolio approaches to fossil-free investing in integrated climate solutions.
- SOCAP15: Developed Divest-Invest conference track
- SOCAP16: Released Divest-Invest Clean 15 portfolio
- SOCAP17: Project participated as event partner
- Investor events in New York (2016), San Francisco (2017), and at the Croatan Forum (2018).
- Now, the consortium is broadening its work beyond the Clean 15 to include new asset classes, expanded selection criteria, and additional strategies, including portfolios for both institutional and individual investors.
- The project is seeking funding partners to sponsor this phase of work.



- Download at [www.cleanportfolio.org](http://www.cleanportfolio.org)

# Divest-Invest Clean 15 Portfolio

- PUBLIC EQUITY
- FIXED INCOME
- PRIVATE DEBT
- PRIVATE EQUITY & VENTURE CAPITAL
- REAL ASSETS





# Climate Solution Themes



**CLEAN  
TECHNOLOGY**



**COMMUNITY  
DEVELOPMENT**



**ENVIRONMENTAL  
FINANCE**



**GREEN  
BUILDING**



**RENEWABLE  
ENERGY**



**SUSTAINABLE  
FOOD AND  
AGRICULTURE**



**SUSTAINABLE  
FORESTRY**



**TRANSPORTATION**



**SUSTAINABLE  
COMPANIES**



**WATER**

# Current Clean Portfolio Project Sponsors



**Farmland LP**  
Investing in Sustainability™



**CROATAN**  
INSTITUTE

**North Sky**  
CAPITAL



**Breckinridge**  
CAPITAL ADVISORS



**Jonathan Rose Companies**



**renewal**  
Funds  
Investing for Change

**amalgamated** >>>  
FOUNDATION



**Global Asset**  
Management



# Clean Portfolio Project

## Scope of Work

### **This new stage of the Clean Portfolio Project includes:**

- Research and development for expanded clean portfolios with the advice of an expert Advisory Panel.
- Project website and communications strategy, including coordinated social media campaign with project partners and sponsors.
- Development and distribution of Clean Portfolio Project logo and award badges that can be displayed by products selected by the portfolio.
- Investor events, both in person and online, to roll out and draw attention to the Clean Portfolios.

*(Precise scope of work will depend on final budget raised through this sponsorship appeal, but will include at minimum one in-person and one webinar event, and will scale up accordingly.)*

# Clean Portfolio Project Communications

## **Project communications strategy to include:**

- Communications package for sponsors with logos, sample content, and additional brand assets
- Communications package for products included in the Clean Portfolios with special badges, sample content, and additional brand assets
- [Twitter List](#) of individuals and firms involved in the project
- Email marketing
- [LinkedIn group](#) for project sponsors, advisors, and other stakeholders
- Investor events, both in person and online, to roll out and draw attention to the Clean Portfolios and other investment opportunities in climate solutions.

*(Precise scope of work will depend on final budget raised through this sponsorship appeal, but will include at minimum one in-person and one webinar event, and will scale up accordingly.)*



# Clean Portfolio Project Collaborations

- The Clean Portfolio Project is concertedly involving asset owners involved in investor networks such as:
  - The PRI (global asset owners)
  - Ceres Investor Network (130 institutional investors with more than \$17 trillion assets, primarily US focused)
  - The Climate Solutions Collaborative (C2C) of Confluence Philanthropy (philanthropic foundations and family offices)
  - DivestInvest (approximately 60,000 individuals and 800 organizations pledged, with \$5.5 trillion in assets)
  - SOCAP (high net worth impact investors and entrepreneurs)
- (Precise scope of work will depend on final budget raised through this sponsorship appeal, but will include at minimum one in-person and one webinar event, and will scale up accordingly.)



# Clean Portfolio Project Events

## Investor events:

- Intimate in-person gatherings of 25-50 people. For example, the project has done a small SOCAP 365 event at ImpactHub in New York, and a small investor roundtable convening in San Francisco, as well as participating in SOCAP17 as an event partner, and organizing a conference session at the Croatan Forum in 2018.
- Sponsor-driven collaborative events around the country. Potential event locations under current consideration include NC's Research Triangle, New York, Chicago, Boston, DC, and the Pacific Northwest.
- Online investor webinar(s) to allow a broader audience to participate, including webinars highlighting climate solution investment opportunities by theme and asset-class.

*(Precise scope of work will depend on final budget raised through this sponsorship appeal, but will include at minimum one in-person and one webinar event, and will scale up accordingly.)*

# Lead Sponsor: \$15,000 (2 available)

## Benefits Include:

### **Investor Events in 2019:**

- 10 comp tickets to all investor events.
- Plenary panel slot at all investor events.
- Acknowledgment at the beginning of all investor events, with introductions of company representative(s) present.
- Logo included on materials as a sponsor.

### **Marketing:**

- Name and LARGE LOGO on Clean Portfolio Project publications and all related communications, including website.
- Enhanced media opportunities (social media, featured blog).
- Ability to display and distribute marketing materials with priority placement at each investor event.
- Ability to publish guest blogs

### **Brokered introductions to strategic partners**

# Benefactor Sponsor: \$10,000 (4 available)

## Benefits Include:

### **Investor Events in 2019:**

- 8 comp tickets to all investor events
- Plenary panel slot at 1 investor event
- Acknowledgment at the beginning of all investor events, with introductions of company representative(s) present.

### **Marketing:**

- Name & MEDIUM LOGO on Clean Portfolio Project publications and all related communications, including website.
- Enhanced media opportunities (social media, featured blog).
- Ability to display and distribute marketing materials at each investor event.
- Ability to publish guest blogs

### **Brokered introductions to strategic partners**

# Steward Sponsor: \$5,000

(6 taken, 4 available)

## Benefits Include:

### **Investor Events in 2019:**

- 5 comp tickets to all investor events
- 2-minute greeting at 1 investor event
- Acknowledgment at the beginning of all investor events, with introductions of company representative(s) present

### **Marketing**

- Name and SMALL LOGO on Clean Portfolio Project publications and all related communications, including website.
- Ability to display and distribute marketing materials at each investor event.
- Ability to publish guest blogs

### **Brokered introductions to strategic partners**



# Supporting Sponsor: \$2,500

## Benefits Include:

### **Investor Events in 2019:**

- 2 comp tickets to all investor events
- Acknowledgment at the beginning of all investor events

### **Marketing**

- Organization name on Clean Portfolio Project publications and all related communications, including website.
- Ability to display and distribute marketing materials at each investor event.

# Clean Portfolio Project Sponsorship Opportunities

SPONSORSHIP LEVELS	Lead \$15,000	Benefactor \$10,000	Steward \$5,000	Supporting \$2,500
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## Investor Events Recognition (Online & In-Person)

Free tickets to events	10	8	5	2
Acknowledgment at all events	•	•	•	•
Introductions of representative(s) present	•	•	•	
Plenary panel slot at events	All Events	1 Event		
2-minute greeting at 1 event			•	

## Marketing Opportunities

Recognition on all CPP reports/communications	Large Logo	Medium Logo	Small Logo	Name listed
Your materials at each event	•	•	•	•
Brokered introductions to strategic partners	•	•	•	
Enhanced media opportunities	•	•		

# Discounted Sponsorship Opportunities for Clean 15 Sponsors

## Perks for existing sponsors:

- For sponsors of the 2016 #Clean15 phase of this project, your sponsorship will continue to be acknowledged at the level you contributed at – but with no additional benefits associated with this new phase of the project.
- If you would like to take advantage of benefits associated with this new phase of the project, your renewed sponsorship can either be discounted in recognition of your past support or stepped up to a higher level.
- Please contact Christi Electris at [christi@croataninstitute.org](mailto:christi@croataninstitute.org) for more specific information about your situation.

# NOTES

## NOTE ON SPONSORSHIP

Inclusion in a Clean Portfolio is based solely on the selection criteria. Sponsors of the initiative provide critical underwriting for the project, including research and publication, but sponsorship is not a criterion for inclusion in the portfolio. As the consortium broadens beyond the Clean 15, the Clean Portfolio Project welcomes the participation of additional funding partners to sponsor this new phase of work.

## DISCLAIMER

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# Contact

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a sponsor, please contact:

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