

## Our History

CIIC was established in November 2014 as an informal “neutral space” for people to come together, share a meal and stories, and build relationships based on their spiritual as well as financial commitment to impact investing. CIIC was started in the U.S. Midwest, soon grew to the Northeast and other areas in the U.S., and is now expanding globally.

In October 2019, CIIC launched the Catholic Impact Investing Pledge, an effort to galvanize the Catholic investment community to commit to take meaningful and accountable steps to incorporate impact investment into their portfolio in alignment with Catholic Social Teachings. The community of 35+ pledge partners includes a global group of pioneering Catholic institutions who have led the way on impact investing, representing 6 countries and over \$40B in assets. This group has committed not only to maintain their focus on internal impact investment programs but is also helping to grow the broader ecosystem of Catholic impact investing.

In September 2021, CIIC launched a Membership Program for Catholic asset owners and partners to connect, collaborate and accelerate the flow of financial resources toward investments that measurably contribute toward integral human development and an integral ecology in alignment with Catholic Social Teaching. As part of this program, we launched a dedicated platform for Catholic institutional investors looking to accelerate their impact investing efforts, including a peer-sourced impact investing deal-sharing dashboard.

***“I urgently appeal, then, for a new dialogue about how we are shaping the future of our planet. We need a conversation which includes everyone, since the environmental challenge we are undergoing, and its human roots, concern and affect us all.”***

**Pope Francis, Laudato Si**

### Additional Information

- Contact us: [info@catholicimpact.org](mailto:info@catholicimpact.org)
- Read our members' stories of impact: [www.catholicimpact.org/stories](http://www.catholicimpact.org/stories)
- Impact resources & more: [www.catholicimpact.org/resources](http://www.catholicimpact.org/resources)



## Financial Intermediaries Membership

**Are you ready to grow your impact in community with other Catholic investors and partners? By sharing our experiences and celebrating our Catholic faith and values, we seek to steward our financial resources in service to people and planet.**



**COLLABORATE** with like-minded investors and partners by sharing knowledge, best practices and impact investing opportunities



**ACCELERATE** the flow of Catholic financial resources toward investments that pursue intentional, positive and measurable impact

**WHY JOIN CIIC?** To be included in an impact investing community with a uniquely Catholic focus, built on trust and guided by Catholic Social Teaching (CST), where connections lead to action in allocating capital for a more just, equitable and sustainable world. To demonstrate credibility with Catholic clients by being part of a network — *Catholic Impact Investing Collaborative is the only impact network mentioned in the updated USCCB Responsible Investing Guidelines* — authentically dedicated to, and leading in, the Catholic impact investing space. To help shape the sector while sharing your firm's unique expertise in service to valued-aligned asset owners.

## Our Mission

**By sharing our experience and celebrating our Catholic faith and values, we seek to expand the stewardship of financial resources in service to people and planet.**

## Our Vision

**To foster a world where capital is a transformative force for good, stewards the environment and enhances both equality and human dignity.**

The Catholic Impact Investing Collaborative (aka CIIC – pronounced “seek”) is the global convener of a trusted impact investing community with a uniquely Catholic identity, where learnings lead to action in allocating capital for a more just, equitable and sustainable world. We build relationships, foster collaboration and peer learning, provide access to opportunities, and leave room for the Holy Spirit to guide our work.

Pope Francis challenged us to bold action, to “...redesign the economy so that it can offer every person access to a dignified existence while protecting and regenerating the natural world” (Let Us Dream). In response, CIIC seeks to equip and catalyze our community to go beyond the conventional finance system – and through investments that pursue intentional, positive and measurable impact, act always more decisively on the long-term agenda of systemic change.



By demonstrating how capital can be directed to serve undercapitalized local communities across the country and beyond, CIIC has embraced the same vision that congregations of women religious in the United States have achieved over the last 50 years and established a foundation for members and partners to identify and support those who have integrated an Impact mandate into their mission. Under the banner of impact investing, the collaborative is poised to write a new chapter on the Gospel call to care for people and planet.” — Fr. Séamus Finn, OMI, Chief of Faith Consistent Investment, OIP Investment Trust

“We are excited about the growing number of investors that are looking to apply their values to their investments. The ability to collaborate with others that share values should accelerate this momentum and the ultimate impact that the investments are making. CIIC has allowed Catholic investors to do just that by offering a supportive community with a shared vision of using Investments to care for those in need and our environment, as well as providing valuable resources to help further our missions.” — David Erickson, Chief Investment Officer, Ascension Investment Management

“CIIC is an invaluable resource for asset owners seeking to deploy capital to strong impact opportunities that are aligned with Catholic values. Through CIIC, members can tap into the experience of seasoned impact investors, access a robust pipeline of peer-sourced investments, and build relationships in a collaborative community grounded in shared passion for Catholic impact.” — Jake Barnett, Director, Sustainable Investment Stewardship, Wespath Benefits and Investments

## Membership Q&A

### 1. Who may be members of CIIC?

- *Catholic Asset Owners/Investors*: Catholic religious institutions, foundations, colleges and universities, health care systems, family offices and other Catholic-affiliated organizations.
- *Financial Intermediaries*: professional organizations supporting Catholic Asset Owners with advisory, consulting, research, investment management and other services helping them achieve their financial objectives and further their impact investing programs.

### 2. What is the cost to join?

Membership dues for Catholic Asset Owners and Financial Intermediaries are \$3,000 per year payable upfront.

### 3. What is the membership term?

Membership will be offered on a rolling basis for the term of 1 year, renewable at expiration by the member (no automatic renewals).

### 4. What are the benefits of membership?

- Demonstrate engagement with Catholic institutions and credibility with clients, while helping shape the space.
- Better understand issues and challenges that Asset Owners experience, particularly Catholic ones.
- Participate in community peer learning and Catholic Social Teaching-aligned programming.
- Receive CIIC newsletter and member communications, as well as invitations to CIIC webinars, in-person regional gatherings and larger events.
- Be listed in the CIIC Financial Intermediaries Members Directory visible to Asset Owner members, among a few recommended firms (*company information and 2-3 contacts profiled*).
- Visibility and speaking engagement opportunities, including opportunities to present expertise at CIIC webinars and events.
- Share expertise by contributing research, white papers and thought leadership (with new posting highlighted in weekly emails) in response to CIIC requests and Asset Owners’ interests.
- Potential to moderate or coordinate unique Interest Groups with CIIC’s support.
- CIIC logo for website display (*following specific criteria*).

### 5. What do we ask of our members?

- Be referred by a CIIC Asset Owner member or Advisory Board member.
- Commit to putting the CIIC mission first while participating in the CIIC community, including keeping a neutral space and not conducting business development.
  - \* At the individual level: complete and sign a *Code of Conduct*.
- Introduce CIIC resources and Asset Owner membership to their Catholic clients.
- Proactively seek opportunities to engage CIIC in educational efforts of their Catholic clients – i.e., investment committees, CST-aligned investments, etc.
- Be in good standing with respect to Membership Terms and dues.