

## PVA Advisory in a Nutshell

### PVA – Who are we?

We are an independent philanthropic advisory firm (based in Zurich/Switzerland) with a long and professional track record in: the banking- and fund industry as well as philanthropy/grass-roots work.

### PVA – What do we do?

We primarily assist Financial Institutions and Family Offices in offering holistic wealth management services, including value based philanthropy & impact investing.

In that regard we do both:

- Assist Financial Institutions and Family Offices to implement philanthropy and impact investing solutions into their in-house offering and help them to structure their offering;
- Support Financial Institutions and Family Offices in i) advising their private clients along the entire philanthropic engagement process and injecting impact into their giving vision and ii) in setting up impact portfolios and measuring their social and/or environmental impact;

We also assist in related topics like:

- How to implement NextGen offerings?
- How to unlock and structure innovative philanthropic capital?
- How to assist Foundations to become multipliers for social investments?
- How to use, structure and implement blended finance vehicles?
- Promoting the dialogue between Financial Institutions, Public Entities, Private Investors and Social Enterprises
- Implementing integrated impact reporting solutions (including i.e. definition of impact indicators, impact monitoring and impact reporting)

Next to Financial Institutions and Family Offices our clients are: Foundations, Asset Managers, DFIs, NGOs/NPOs and Institutional Investors.

## **PVA – Our value proposition**

We add value to the philanthropic engagements and social investments of our clients by aligning their individual needs and preferences with their philanthropic ambitions and social investment goals/intentions. We help philanthropists and impact investors to become catalysts for achieving social impact at scale.

## **PVA – Our approach towards Philanthropy and Impact Investing**

**Value based Philanthropy:** Philanthropists just like investors want to know that their personal resources (“time and money”) are put the most effective use. Effective philanthropic activities match with the philanthropist’s individual motives and preferences.

**Philanthropy as Leverage for Social Investments:** Today Philanthropy is an important multiplier in the field of social investments as its innovative capital helps to surmount the most critical funding stages (seed- and start-up phase) and stimulates further investments (expansion stage) by making them more attractive and less risky.

**Impact Investing – on the way to mainstream investing:** Impact Investing is seen as the most promising trend by younger philanthropists. Our experience shows that for most investors, impact investing still needs to be translated from a compelling concept into a serious strategy.