



Cracking the Code: How Family Offices are Driving Impact Through Their Investing Strategies

Family offices are increasingly looking beyond financial returns alone when building investment portfolios. As the stewards of multigenerational wealth, many are leveraging their assets to create positive change across generations.

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Driven by a desire to align their investments with societal and environmental goals, some family offices are integrating impact considerations into core strategies. Whether addressing climate change, inequality or other pressing issues, impact investing allows dynasties to further philanthropic missions through profitable vehicles.

With impact and ESG mandates, screened portfolios exclude polluters in favour of burgeoning industries like renewable energy and women/minority-led ventures. Families seek ventures solving real-world problems as passionately as delivering returns.

Scale also enables unique deal-making opportunities. From funding sustainable startups pre-revenue to negotiating renewable infrastructure projects, family influence redirects capital flows.

Pioneering clans likewise galvanize peers. By demonstrating impact and financial success simultaneously, they encourage traditional families toward blended-value investing for multi-faceted legacies.

Patient capital moreover incubates solutions needing time to mature. While others trade on news cycles, committed impact investors nurture game-changing ideas to fruition.

In all, a rising generation of family stewards advance responsibility as core to wealth protection. By stewarding fortunes responsibly, they safeguard wealth of both capital and social/environmental resources for heirs of tomorrow. Impact serves as the new North Star guiding dynastic vision into eras ahead.

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