



**NORTH
BERKELEY
INVESTMENT
PARTNERS**

Invest in Living

COMMUNITY ENGAGEMENT

North Berkeley Investment Partners' provides direct financial support, volunteer hours, and professional services to organizations doing valuable work in our community. We believe that prosperity is not defined solely by individual achievement but by the overall well-being of entire communities. We work as a firm and as individuals to contribute to those things which connect us all.

2017 Community Engagement Highlights

North Berkeley Investment Partners gives to create a positive impact, for us as individuals, for the firm as a whole and, most importantly, for our community. Although giving has many intangible results, we do try to inspire continued participation by outlining the impact of our giving over the course of a year so that we can strive to do even better the next year.



GIVING TARGET

1%

of yearly revenue

Community organizations donated to in 2017

20

Community organizations volunteered at by our team

10

125

Volunteer Hours Used

Areas of Focus

Education/Literacy

Social Justice

Healthy Communities

Environmental Sustainability

Community Engagement and Volunteering Highlights

Albany School District
 Bay Area Book Festival
 Berkeley Food Network
 Berkeley Public Library Foundation
 Berkeley High School

The Bread Project
 Contra Costa Independent Living Skills
 Ecology Center
 Oakland Tech High School
 Personal Financial Planning Program @ Cal Extension

Prospect Sierra
 Rosa Parks School
 Writer Coach Connection
 YEAH!
 YES! - Nature to Neighborhoods

2017 Sponsorship and Donation Highlights

ABGSL
 Albany Education Foundation
 Bay Area Book Festival
 Berkeley High School Athletic Fund

Compass Family Services
 Down Syndrome Connection
 Nicholas Colby Fund
 Save the Bay
 SF Girls Chorus

Street Soccer USA
 Step One School
 Sustainable Fairfax
 Women's Cancer Resource Center



COMMUNITY ENGAGEMENT

Areas of Focus

We focus our giving efforts on things we are passionate about so that we can have a deeper and longer lasting impact in our community.

Education/Literacy

An investment in education is an essential factor in developing a strong and healthy society. We support local organizations that improve educational programs in our East Bay communities. We have a special interest in financial literacy and promoting sustainable financial decision-making.

Healthy Communities

There are many facets to a healthy community including personal and family well-being; arts and culture; and advanced citizenry. We focus on the Bay Area in our charitable donations in an effort to create equitable and sustainable communities that benefit and enrich everyone.

Environmental Sustainability

One of the single biggest challenges facing each of us, our communities, and the world as a whole is the deterioration of our natural environment. We provide contributions to organizations striving to have a positive impact in environmental education, and direct environmental action to create a more sustainable world.

Social Justice

A just social system that provides equal opportunity to all groups, regardless of race, religion, gender or sexual orientation, is a moral imperative. We support organizations that tackle issues of social justice and seek systemic change.

Community Partners

We partner with select organizations by offering them the volunteer time of our team, professional guidance and direct financial support. We believe in their missions and want to ensure their continued operation and success, as well as promote their benefits to our local community members. These organizations also provide the broad framework of our areas of focus which are Education, Healthy Communities, Environmental Sustainability, and Social Justice.



Berkeley Public Library Foundation

Encouraging literacy and creating healthy communities

Libraries connect us, building our community, expanding our world, and changing lives. Through fundraising and advocacy, the BPLF amplifies public investment in the Berkeley Public Library to make an already great library extraordinary.



Yes! Nature to Neighborhoods

Providing access to experiences in the natural environment

Since 1999, YES has brought nearly 5,000 youth and an additional 1,000 families from low-income Richmond neighborhoods to summer and family camps located in pristine redwood settings across Northern California.



The Ecology Center

Building a sustainable local environment

Their mission is to inspire and build a sustainable, healthy, and just future for the East Bay and beyond by transforming the ideals of sustainability into everyday practice.



YEAH! - Youth Engagement, Advocacy, and Housing

Enriching young lives by providing a safe environment

Their mission is to support young adults (ages 18-25) in Berkeley who are homeless. They provide basic necessities, offer case management and counseling, establish linkages to education, employment and housing, and provide opportunities for community involvement.



Sponsorships

Our sponsorships provide substantive financial support for events and fundraisers for non-profit organizations doing exceptional work to make our communities healthy and prosperous. Sponsorships create avenues for our firm to promote organizations while simultaneously building recognition of our firm in the community. We also seek opportunities to build long-lasting impact by partnering with fundraising efforts on an on-going basis.

Impact and Visibility

Our sponsorships are a higher level of donation for specific fundraising events and create an added business development aspect for the firm. By directly funding causes we believe in, we align our firm's values with the broader community.

Guidelines

All sponsorships are agreed upon by the firm's leadership team. We welcome suggestions for possible sponsorship opportunities. Please provide the details via email to the head of the giving program or a member of the leadership team. Sponsorships will focus on non-profit 501(c)(3) organizations that benefit the well-being of our local communities, and focus on our specified sectors of giving.

Community Building

A major component of a sponsorship is the community building provided by integrating our firm into the community, interacting with local change-makers, and building stronger networks.

Process

At the end of each year, a review will be conducted of all of the sponsorships given during that year and each will be assessed based on its impact. Concurrently, a list of potential sponsorships for the coming year will be developed. Any organizations wishing to be considered can submit their sponsorship request to the head of the giving program. The organization will be notified by mail or email if a sponsorship will be made.



Firm Donations

North Berkeley Investment Partners believes that the continued support of valued organizations in our community helps us all grow stronger together. Our advisors and leadership team initiate giving throughout the year focusing on organizations that are important to our firm, our clients, and our network of professionals.

Guidelines

Advisors are encouraged to use a portion of our giving funds for firm, client, and prospect related giving and may donate to any organization that they determine meets the firm's giving program guidelines. This includes event attendance such as seats at fundraisers or participation in a fundraising activity.

Sustained Support and New Opportunities

Part of the giving program is to establish sustained support of organizations we believe in and seek to maintain consistent donations from year to year. We also actively seek out new donation opportunities and encourage team members and clients to suggest organizations that meet our giving guidelines and areas of interest. The growth of the firm will allow for more donation opportunities.

Employee Donations

We encourage everyone on our team to be engaged community members. We provide \$250 a year per employee for charitable donations in their name. The employee donation program is set up to deepen the impact of our donations and to broaden the scope of our giving program by opening it up to additional organizations in our community.

Guidelines

Contributions of up to \$250 can be given per employee, per year. Contributions are made to 501(c)(3) nonprofit organizations and 501(c)(4) social welfare organizations. Donations are not limited to those that fall within the firm's *areas of giving* but reflect the individual interests of employees.

Giving promotes well-being

Giving helps our local communities and society by supporting ideas and actions that are otherwise under-served by traditional forms of business and government. Giving is also beneficial for the giver, leading to increased levels of happiness and well-being that in return impacts the well-being of those around them.

Community Involvement

North Berkeley Investment Partners is an active member of the community and uses its time and expertise to support local organizations so that they can better achieve their missions and have a deeper impact in the community. We provide organized volunteer opportunities for our team and encourage individual volunteering by providing paid service time. Our leadership team is actively involved in providing their expertise and counsel to our community partners and other organizations that reflect our areas of focus.

Paid Service Time

North Berkeley Investment Partners provides five paid service days a year for each member of its team. That amounts to approximately 500 available collective service hours a year. We encourage and mentor team members on finding organizations that they are passionate in supporting and how best to utilize their unique, individual expertise.

Expertise in Action

We are experts in our fields of investment management and financial planning. Nonprofit organizations often lack access to this expertise and our leadership team seeks opportunities to provide guidance through active participation on boards and committees.

Working as a Whole

The power of many, working together is mighty. We encourage our team members to spend time in their communities, engaged in service activities that strengthen their connection to those around them. We also provide opportunities for the firm to work as a whole on specific issues that relate to our areas of giving, leveraging our collective strength and reinforcing the bonds we share as a team.

COMMUNITY INVOLVEMENT

Volunteer Highlights



S. Katherine Campbell, CFP®

Partner & Senior Advisor,
North Berkeley Investment Partners
Co-founder, Chair & Board Member,
Berkeley Food Network

2017 was a busy year for Kate. She help found the new nonprofit, Berkeley Food Network, which is now serving as a crucial nexus for more effective services to provide food security for all of Berkeley's citizens.

More information at
berkeleyfoodnetwork.org



Matthew Gatt, CFP®

Lead Advisor,
North Berkeley Investment Partners
Board Member & Treasurer,
Yes! Nature to Neighborhoods

In 2017 Matthew joined the board of our community partner YES! Nature to Neighborhoods and took on the role of Treasurer. YES! provides access to experiences in nature for local youth and their families. Matthew is responsible for their strategic budgeting and resource projections.

More information at
yesfamilies.org

2017

STORIES

There are many organizations doing amazing work to promote the well-being of our shared communities. We consider ourselves very lucky to partner with people, programs and events that are dedicated to causes that enrich all of our lives. From the cultural force that is the Bay Area Book Festival to the continued environmental impact of the Ecology Center, the real impact is happening on the ground carried out by dedicated organizations and volunteers. We're pleased to share a few of their 2017 success stories.

A Nexus for Food Security in Berkeley

Berkeley Food Network

Food security—reliable access to and a sufficient quantity of food—is a concern for a growing number of people in the Bay Area. Increased living expenses and greater wage gaps are just two of the reasons why someone may go hungry. There are dozens of organizations in Berkeley that provide ongoing support to support food security but up until now the efforts were not coordinated. Launched in 2017, the Berkeley Food Network is becoming a nexus for food security by providing resources to people who need food, agencies that provide food, and volunteers and donors that want to make a difference.

More at berkeleyfoodnetwork.org



A Book Festival Grows in the Bay Area

Bay Area Book Festival

The Bay Area Book Festival continued to grow in stature in 2017. It brought hundreds of authors, and thousands of fans of literature to downtown Berkeley for two days of literary fun. The determination, resourcefulness, and passion of the festival organizers has made Berkeley a cultural hub in the spring, and guaranteed that the festival is a mainstay on our calendars. They have also created an event that highlights the power of the written word to affect all people by promoting diverse topics, view points, and styles.

More about the festival on their website baybookfest.org



Curbing Urban Impact in the East Bay

Ecology Center

Since 1969 the Ecology Center has focused on improving the health and the environmental impact of urban residents. They address critical issues through a model of education, demonstration, replication, and legislation. Their vision is a world where human activity nurtures the ecosystems that we all depend on—a world of "green" cities; empowered, resilient communities; zero waste and zero toxics; equal access to healthy food; sustainable resource use; and a safe and stable climate.

More about the programs, farmers markets, and store visit their website at ecologycenter.org





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WORKING AS A TEAM GIVING AS A TEAM

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