



RICHARD ZIMMERMAN

SENIOR ADVISOR, WE FAMILY OFFICES

Richard Zimmerman is a Senior Advisor at **WE** Family Offices, based in New York, where he leads the firm's Values-Aligned Investing Advisory Service. **WE** Family Offices is a Family Office Company that provides strategic wealth advice on approximately \$12.5 billion of assets for over 80 U.S. and international families. **WE** is highly recognized in the industry, including being named among Barron's Top RIA Firms of 2019 and Best Multi-Family Office from \$5 billion AUM/AUA by the family wealth report in 2020.

Richard is a recognized speaker in the Impact Investing arena and works with some of the world's wealthiest families helping them align their values to their investments. He has spoken at over 25 conferences, including the UN Sustainable Investing Conference, Barron's ESG and Impact Summit,

Opal's Impact Investment Forum, and Responsible Investing. He has a positive and pragmatic speaking approach and uses real world examples to illustrate how sophisticated investors can invest with impact.

Richard has held senior positions at global banks and multi-family offices as well as board positions at philanthropic organizations. He is a Board Director at the Capital Institute and has served on the Ceres President's Council, the Earth Charter Initiative International Council, and the Earth Institute Leadership Council.

Richard has a Master of Science in Sustainability Management from Columbia University and a B.A. from the University of Virginia. He holds a Sustainable Investment Professional Certification (SIPC) with the John Molson School of Business as well as numerous financial industry designations. He is a published author of "What Can I Do to Make a Difference," Penguin Books USA, a guide to environmental and social issues and individual actions to make positive change.

Topics of discussion include:

- CLIMATE INVESTING: HOW TO CREATE A CLIMATE-AWARE PORTFOLIO STRATEGY
- VALUES-ALIGNED INVESTING: HOW TO BRING PURPOSE TO YOUR PORTFOLIO
- BLENDED IMPACT: HOW PHILANTHROPY AND INVESTING CAN WORK TOGETHER FOR POSITIVE CHANGE
- ALL IN: THE 100% IMPACT INVESTOR
- GENERATIONAL IMPACT: HOW THE CURRENT AND NEXT GEN CAN WORK TOGETHER TO CREATE MEANINGFUL CHANGE
- DIVERSITY FIRST: HOW TO PRIORITIZE WOMEN AND MINORITY-LED VENTURES
- IMPACT ALPHA: HOW ESG/IMPACT CAN GENERATE POSITIVE FINANCIAL AND MEANINGFUL IMPACT RETURNS
- SOCIAL CAPITAL: HOW TO INVEST FOR THE GOOD OF SOCIETY
- IMPACT AT SCALE: HOW THE SDG'S CAN DRIVE COMMITTED CAPITAL TO GLOBAL CAUSES