Professional Certificate in Family Office Management

Philanthropy and Social Impact Investing in Family Offices

Academic Research refers to the systematic investigation into a subject in order to discover new information or to validate existing knowledge, often used in Philanthropy and Social Impact Investing in Family Offices to identify areas of social impact and measure the effectiveness of philanthropic efforts. Related terms include Applied Research, Basic Research, and Evaluation Research.

Annual General Meeting is a meeting of the shareholders or stakeholders of a company, required by law to be held at least once a year, which may be relevant to Family Offices in terms of governance and compliance. Related terms include Board of Directors, Corporate Governance, and Shareholder Meeting.

Asset Allocation refers to the strategic decision of how to divide investments among different asset classes, such as stocks, bonds, or real estate, in order to achieve a desired return on investment while minimizing risk. Related terms include Diversification, Investment Portfolio, and Risk Management.

Asset Class is a category of investments that have similar characteristics and are subject to similar risk and return profiles, such as stocks, bonds, or commodities, which are often considered in Philanthropy and Social Impact Investing in Family Offices. Related terms include Asset Allocation, Diversification, and Investment Strategy.

Benchmark is a standard or reference point used to measure the performance of an investment or a portfolio, such as a stock market index or a peer group average, which can be used in Philanthropy and Social Impact Investing in Family Offices to evaluate the effectiveness of strategies. Related terms include Evaluation, Investment Performance, and Risk Management.

Benefit Corporation is a type of corporation that is designed to generate both financial and social returns, often used in Social Impact Investing to create positive impact while also generating profits. Related terms include B Corp, Social Enterprise, and Triple Bottom Line.

Board of Directors is a group of individuals elected or appointed to oversee the management of a company or organization, which may be relevant to Family Offices in terms of governance and oversight. Related terms include Annual General Meeting, Corporate Governance, and Executive Committee.

Capital Gains Tax is a tax levied on the profit made from the sale of an investment or asset, such as a stock or a piece of real estate, which can be a consideration in Philanthropy and Social Impact Investing in Family Offices. Related terms include Income Tax, Tax Planning, and Wealth Management.

Carbon Footprint refers to the amount of greenhouse gas emissions associated with a particular activity or product, such as the production of a ton of steel or the operation of a vehicle, which can be a consideration in Social Impact Investing. Related terms include Environmental Impact, Sustainability, and Renewable Energy.

Charitable Giving refers to the act of donating money or other resources to a charitable organization or cause, often used in Philanthropy to support social causes. Related terms include Donor-Advised Fund, Foundation, and Grantmaking.

Charitable Lead Trust is a type of trust that provides a stream of income to a charitable organization for a specified period of time, after which the remaining assets are distributed to non-charitable beneficiaries, which can be used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Charitable Remainder Trust, Donor-Advised Fund, and Planned Giving.

Charitable Remainder Trust is a type of trust that provides a stream of income to the donor or other non-charitable beneficiaries for a specified period of time, after which the remaining assets are distributed to a charitable organization, which can be used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Charitable Lead Trust, Donor-Advised Fund, and Planned Giving.

Climate Change refers to the long-term warming of the planet due to an increase in average global temperatures, often considered in Social Impact Investing as a key area of focus. Related terms include Environmental Sustainability, Greenhouse Gas Emissions, and Renewable Energy.

Community Development Financial Institution is a type of financial institution that provides financial services to low-income or marginalized communities, often used in Social Impact Investing to support economic development. Related terms include Microfinance, Social Enterprise, and Triple Bottom Line.

Corporate Governance refers to the system of rules, practices, and processes by which a company is directed and controlled, which may be relevant to Family Offices in terms of oversight and compliance. Related terms include Annual General Meeting, Board of Directors, and Executive Committee.

Corporate Social Responsibility refers to the voluntary efforts of a company to improve social and environmental outcomes, often considered in Social Impact Investing as a key area of focus. Related terms include Sustainability, Environmental Sustainability, and Social Enterprise.

Crowdfunding is a method of raising funds from a large number of people, typically through an online platform, which can be used in Social Impact Investing to support social causes. Related terms include Peer-to-Peer Lending, Social Enterprise, and Triple Bottom Line.

Donor-Advised Fund is a type of fund that allows donors to make charitable contributions and then recommend grants to charitable organizations over time, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Charitable Giving, Foundation, and Grantmaking.

Due Diligence refers to the process of conducting a thorough investigation or audit of a potential investment or business opportunity, which can be used in Philanthropy and Social Impact Investing in Family Offices to evaluate investment opportunities. Related terms include Evaluation, Investment Analysis, and Risk Management.

Economic Development refers to the process of improving the economic well-being and quality of life for individuals, communities, or regions, often considered in Social Impact Investing as a key area of focus. Related terms include Community Development, Microfinance, and Social Enterprise.

Endowment refers to a fund or foundation that is established to provide long-term financial support for a charitable organization or cause, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Donor-Advised Fund, Foundation, and Grantmaking.

Environmental Impact refers to the effect of human activities on the natural environment, often considered in Social Impact Investing as a key area of focus. Related terms include Carbon Footprint, Sustainability, and Renewable Energy.

Environmental Sustainability refers to the ability to maintain or support a process without depleting natural resources or harming the environment, often considered in Social Impact Investing as a key area of focus. Related terms include Climate Change, Greenhouse Gas Emissions, and Renewable Energy.

Evaluation refers to the process of assessing the effectiveness or impact of a program, project, or investment, which can be used in Philanthropy and Social Impact Investing in Family Offices to measure outcomes. Related terms include Benchmark, Due Diligence, and Investment Analysis.

Executive Committee is a group of senior executives or managers responsible for making strategic decisions and overseeing the management of a company or organization, which may be relevant to Family Offices in terms of governance and oversight. Related terms include Annual General Meeting, Board of Directors, and Corporate Governance.

Family Foundation is a type of foundation that is established and controlled by a family, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Donor-Advised Fund, Endowment, and Grantmaking.

Family Office refers to a private organization that manages the financial and personal affairs of a wealthy family, often involved in Philanthropy and Social Impact Investing. Related terms include Asset Management, Wealth Management, and Investment Strategy.

Foundation is a type of organization that is established to provide charitable support for a particular cause or community, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Donor-Advised Fund, Endowment, and Grantmaking.

Grantmaking refers to the process of providing financial support to charitable organizations or causes, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Donor-Advised Fund, Foundation, and Endowment.

Green Bond is a type of bond that is specifically used to finance environmental or sustainable projects, such as renewable energy or green infrastructure, which can be used in Social Impact Investing to support environmental sustainability. Related terms include Social Impact Bond, Environmental Sustainability, and Renewable Energy.

Impact Investing refers to the practice of investing in companies, organizations, or funds with the intention of generating both financial and social or environmental returns, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Social Impact Investing, Environmental Sustainability, and Triple Bottom Line.

Income Tax refers to a tax levied on the income earned by an individual or company, which can be a consideration in Philanthropy and Social Impact Investing in Family Offices. Related terms include Capital Gains Tax, Tax Planning, and Wealth Management.

Investment Analysis refers to the process of evaluating and assessing investment opportunities, which can be used in Philanthropy and Social Impact Investing in Family Offices to evaluate investment opportunities. Related terms include Due Diligence, Evaluation, and Risk Management.

Investment Portfolio refers to a collection of investments held by an individual or organization, which can be used in Philanthropy and Social Impact Investing in Family Offices to manage investments. Related terms include Asset Allocation, Diversification, and Risk Management.

Investment Strategy refers to the approach or plan used to achieve investment objectives, which can be used in Philanthropy and Social Impact Investing in Family Offices to guide investment decisions. Related terms include Asset Allocation, Diversification, and Risk Management.

Microfinance refers to the provision of small loans or other financial services to low-income or marginalized individuals or communities, often used in Social Impact Investing to support economic development. Related terms include Community Development Financial Institution, Social Enterprise, and Triple Bottom Line.

Mission-Related Investing refers to the practice of investing in companies, organizations, or funds that align with the mission or values of a philanthropic organization or family office, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Impact Investing, Social Impact Investing, and Environmental Sustainability.

Non-Profit Organization is a type of organization that is established to provide charitable or public benefit, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Foundation, Grantmaking, and Social Enterprise.

Peer-to-Peer Lending is a type of lending that involves lending money to individuals or businesses through an online platform, often used in Social Impact Investing to support small businesses or entrepreneurs. Related terms include Crowdfunding, Social Enterprise, and Triple Bottom Line.

Philanthropy refers to the practice of donating money, time, or other resources to support charitable causes or organizations, often used in Family Offices to make a positive impact on society. Related terms include Charitable Giving, Donor-Advised Fund, and Grantmaking.

Planned Giving refers to the process of planning and arranging charitable gifts, such as bequests or trusts, that are made during an individual's lifetime or at death, often used in Philanthropy and Social Impact

Investing in Family Offices. Related terms include Charitable Giving, Donor-Advised Fund, and Grantmaking.

Program-Related Investment is a type of investment made by a philanthropic organization or family office to support a charitable program or activity, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Mission-Related Investing, Impact Investing, and Social Impact Investing.

Renewable Energy refers to energy generated from natural resources that can be replenished over time, such as solar or wind power, often considered in Social Impact Investing as a key area of focus. Related terms include Environmental Sustainability, Greenhouse Gas Emissions, and Climate Change.

Risk Management refers to the process of identifying, assessing, and mitigating risk in investment portfolios or business operations, which can be used in Philanthropy and Social Impact Investing in Family Offices to manage risk. Related terms include Asset Allocation, Diversification, and Investment Strategy.

Social Enterprise is a type of organization that is established to address social or environmental problems while also generating revenue, often used in Social Impact Investing to create positive impact. Related terms include Social Impact Investing, Environmental Sustainability, and Triple Bottom Line.

Social Impact Bond is a type of bond that is specifically used to finance social or environmental projects, such as education or healthcare initiatives, which can be used in Social Impact Investing to support social causes. Related terms include Green Bond, Environmental Sustainability, and Triple Bottom Line.

Social Impact Investing refers to the practice of investing in companies, organizations, or funds with the intention of generating both financial and social or environmental returns, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Impact Investing, Environmental Sustainability, and Triple Bottom Line.

Sustainability refers to the ability to maintain or support a process without depleting natural resources or harming the environment, often considered in Social Impact Investing as a key area of focus. Related terms include Environmental Sustainability, Climate Change, and Renewable Energy.

Tax Planning refers to the process of managing and minimizing tax liabilities, which can be a consideration in Philanthropy and Social Impact Investing in Family Offices. Related terms include Income Tax, Capital Gains Tax, and Wealth Management.

Triple Bottom Line refers to the concept of evaluating the performance of a company or organization based on three factors: financial, social, and environmental returns, often used in Social Impact Investing to evaluate impact. Related terms include Social Impact Investing, Environmental Sustainability, and Corporate Social Responsibility.

Venture Philanthropy refers to the practice of applying venture capital principles to philanthropic investing, often used in Philanthropy and Social Impact Investing in Family Offices. Related terms include Impact Investing, Social Impact Investing, and Environmental Sustainability.

Wealth Management refers to the process of managing and preserving wealth, which can be a consideration in Philanthropy and Social Impact Investing in Family Offices. Related terms include Asset Management, Investment Strategy, and Tax Planning.