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Using Wealth for Good: Charly Kleissner on Impact Investing

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He may be one of the most visible figures in the emerging movement, but Charly Kleissner realizes that there is still a lot of healthy skepticism surrounding about impact investing.

“I know there are a lot of questions,” Kleissner says.

If anyone is in a position to answer some of those questions, however, it’s Kleissner—particularly given how he has embraced the strategy in his own investment approach. It all began for Kleissner back in 2004, when he and his wife, Lisa, began to think more seriously about how to manage and invest their wealth, and challenged their advisors to align their wealth with their own values.

To hear him tell it in his own words:

“We looked into philanthropy. And when I did, I saw that actually the old way—which is mostly focused on handouts—is actually part of the problem. Overall, I think the development model of handing out grants for solving systemic issues has failed. And for us, just maximizing profits without any consideration of impact, has failed. So we wanted to find a way to combine the two. We do not think profits are bad. We actually think profits are really good, and want to maximize both profits and impact.”

Kleissner decided to move forward with a plan that was not just focused on investments, or traditional philanthropic efforts, but was instead a comprehensive, dynamic approach to how and where they put their money to work.

“We really believe the challenge of the 21st century is for humanity to figure out how to live on a resource-limited planet,” says Kleissner. “Our focus is to invest with impact.”

To invest with impact (or impact investing) is to utilize a strategy revolving around investments made with the intention of generating positive environmental or social impacts, as well as financial returns. In the years since embracing impact investing, Kleissner says he has seen good

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returns on his investments, while simultaneously feeling good about them and the impact they are having on the world. Encouraged by the results, he co-founded the 100% IMPACT Network—which is part of Toniic—a global network of impact investors that now boasts 80+ owners controlling approximately \$4 billion dollars in assets.

“We get to work with people around the globe who want to make an impact. And in our opinion, if people saw a way to align their wealth with those causes that they believe in, and could simultaneously see a focused financial recurrence with whatever their long term needs are, they would absolutely start doing it.”

What’s more, Kleissner says the move toward impact investing has helped engage his own family. “We started to figure out how to use our wealth for positive contributions,” he says, “And in our case, it has been a truly unifying force with our kids. We have two grown adult children who have been participating in this, and we have converged around this.”

Impact investing may not be for everyone, but if you are looking to shake up your philanthropy strategy and/or align at least some of your investment portfolio with your own personal values, then it is looking more and more like a practical and feasible strategy to implement.

Charly Kleissner will be moderating a family member panel on impact investing at the 2015 FOX Fall Forum. [Click here to learn more.](#)

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A marketing veteran with experience in developing branding, messaging, and marketing strategies, Marv leads the continuing development of the FOX marketing strategy globally and oversees the creation and execution of supporting marketing, communications, social media, and public relations programs. He was instrumental in the conception, structure, and design of the FOX website.

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