

Intentional Endowments Network

**New Member Application Form**

Thank you for your interest in joining the Intentional Endowments Network (IEN). Please fill out this form and return it to info@intentionalendowments.org. For details on member benefits and prices please visit: [www.intentionalendowments.org/membership\_and\_benefits](https://www.intentionalendowments.org/membership_and_benefits).

1. What is your organization type? (check one)

[ ]  Endowment / Asset Owner

[ ]  Investment Manager

[ ]  Investment Consultant/ Advisor / OCIO

[ ]  Non-profit without endowment

[ ]  Individual / Sole Proprietor

1. What are your assets under management (or if not applicable, annual revenue)?

1. How did you hear about IEN?
2. Please describe where you are in your process around mission-aligned, sustainable investing. *For each area below, indicate yes/no and include any context you would like.*

***Governance Process:*** Has your organization undertaken the following steps?

* Learning: Investment team and Board has been learning about sustainable investing and staying educated on the evolving field *(Yes/No)*
* Consensus Building: the Board has built consensus around its view and strategy on sustainable investing *(Yes/No)*
* Investment Policy: Sustainable investing is institutionalized in the Investment Beliefs and/or Policy Statement  *(Yes/No)*

***Implementation strategies:*** which of the following strategies does your organization pursue?

[ ]  ESG integration

[ ]  Negative screens / divestment

[ ]  Shareholder engagement

[ ]  Impact Investing

[ ]  Sustainable investing sleeve

[ ]  Sustainable investing Student Managed Fund

[ ]  Sustainable investing options in employee retirement plans

***Transparency:*** Does your organization report and communicate to stakeholders on your sustainable investing strategies and outcomes? For example, do you provide information on investment managers, underlying holdings, or companies or sectors that are prioritized or excluded? Or communicate via annual reports, PRI reporting, AASHE's STARS, etc?

***Social Equity:*** Is your investment process designed to reduce inequality and promote social equity? (E.g., Working to address racial equity, gender equity, income inequality, etc. through diverse manager programs, investment selection, corporate engagement, etc.)

***Climate Change:*** Is your investment process designed to reduce climate risk and/or invest in climate solutions? (E.g., Net zero portfolios, fossil fuel divestment, investing in climate solutions, corporate engagement, etc.)

1. **Primary contact:** Who is the point person for correspondence related to IEN?

1. **Invoicing contact:** Who is the point of contact for billing (if different)?

1. **Profile Page description:** We typically list members on the [Network Members page](https://www.intentionalendowments.org/network_members), and provide an individual profile page for each member. Please share the following information below for your member profile page:

	1. Confirm the official organization name for the IEN member listing:
	2. A brief (~1-2 paragraph) description that you'd like us to use on the website:
	3. Any relevant resources (white papers, video links, etc.) you would like us to link to:
	4. Please attach a logo to include on the page (transparent background is preferred)
2. **Member Directory:** The IEN Member Contact Directory can be accessed by signing into the Member Portal. The Directory is designed to facilitate peer learning and engagement amongst members. Are you comfortable having your contact information listed in the directory?  *(Yes / No)*
3. **Member Portal**: In order to access members-only resources, you will need to create a basic profile (username and password). [See instructions here](https://www.intentionalendowments.org/member_portal_faqs). Who from your organization will need access to the Member Portal? Please list their names and email addresses (add as many as you would like):

Name: Email:

Name: Email:

Name: Email:

1. **Working Groups:** IEN's [Working Groups](https://www.intentionalendowments.org/working_groups) connect periodically online or in-person around topics related to rising trends in endowment management. Please select the Working Group(s) that you are interested in joining or learning more about:

	1. Fiduciary Duty: *(Yes / No)*
	2. Shareholder Engagement: *(Yes / No)*
	3. Diversity, Equity, & Inclusion (DEI)
	and Gender Lens Investing: *(Yes / No)*
	4. Sustainable & Impact Investing

Learning and Knowledge (SIILK) *-*

*student managed funds and sustainable*

*finance education and research:*  *(Yes / No)*

* 1. Trustee Peer Learning *(open to trustees):*  *(Yes / No)*
	2. Net Zero Portfolios *(Yes / No)*
	3. Other: *(Yes / No)*
1. What are you looking to contribute to and get out of the Network?
2. **Question for Asset Managers**: IEN offers a non-comprehensive list of investment options for members. To highlight your product, please send us information on:
* Year Firm Was Founded
* Name of Product/Strategy
* Inception date for Product
* Investment Strategy Description (1-2 sentences or can be a link to a document or web page)
* ESG/Impact Strategy Description
* Asset Class(es)
* Management Fee
* Minimum Investment
* Vehicle Type
* Availability (closed, daily/monthly subscription, etc)

After you complete the application, please return it to info@intentionalendowments.org. Thank you!