

Aligned Investments - Solidarity Circle Description

Description:

How do we be bold, and envision the world that we want to see? And how do we align our investments in service to our vision?

This circle invites individual and institutional members of Solidaire with investments into peer-to-peer learning and community to dive deep with each other on how to use invested resources to support movements. This Solidarity Circle is designed to help members learn and grow in a confidential cohort, and build relationships for future collaboration.

Philanthropy and investment management walk in parallel tracks with each other, within DAFs, Foundation endowments, and personal wealth. Yet investment portfolios are often in deep incongruence with individual and institutional stated values. As part of Solidaire's 10-year strategy, we are committed to bringing "the other 95%" to the table in this most decisive decade, to be in greater service to the communities we love.

Goals:

- Create a framework of questions and ways to assess what an aligned investment portfolio looks like over time even as conditions change
- Develop a toolbox of financial approaches for providing integrated capital support to social movements; members gain the skills they need to invest in movements
- Build relationships amongst cohort members to be able to support each other now and in the future

Who is this for?

Solidaire members (individuals + institutions) who:

- Are emotionally and philosophically ready to remake their portfolios, but don't know where to begin;
- Have partial alignment in their investments but are ready to deepen and refine their portfolios;
- Have hit stumbling blocks when negotiating with multiple stakeholders, whether its family members, hired professionals, fellow trustees or directors, or any other time when making investment decisions via committee;
- Advanced practitioners of Integrated Capital who would like to skill share and/or learn about the current ecosystem and opportunities.

This inquiry based course will invite cohort members to sharpen their critical skills around investment.

What is the format?

Six hour and a half sessions, held monthly, beginning in January and ending in June. Cohort size will be capped at 20 people.

Draft Overview of Possible Sessions (final agenda will be forwarded in late December):

- Session 1** - Getting to know the cohort – introductions and trust building
- Session 2** - How mainstream investments actively undermine our racial justice goals
- Session 3** - Solidarity Economy Ecosystem Landscape Analysis
- Session 4** - Portfolio Management
- Session 5** - Individual and Institutional Portfolio Case Study
- Session 6** - Cohort-led session and integration, closing

Timeline:

Sessions will be scheduled between January and June 2024. Exact dates coming soon.

Participants are expected to sign up for the full slate of sessions (though it's okay if you have to miss 1 session), as we're using a cohort model and want to build consistency with each other. There is no cost for joining this circle for Solidaire members.

Facilitator Bios:

Nwamaka Agbo

Nwamaka Agbo is the CEO of the [Kataly Foundation](#) and Managing Director of the [Restorative Economies Fund](#) (REF). In her roles, Nwamaka collaborates with the Kataly team to lead the foundation's day-to-day operations, while holding the community-centered strategy and vision for the REF. With a background in community organizing, electoral campaigns, policy and advocacy work on racial, social and environmental justice issues, Nwamaka is deeply committed to supporting projects that build resilient, healthy and self-determined communities rooted in shared prosperity. Prior to her roles with Kataly, Nwamaka built an independent consulting practice guided by her framework on [Restorative Economics](#). As a consultant, she provided technical assistance and strategic guidance to community-owned and -governed community wealth building initiatives like Restore Oakland, Black Land & Power and others. Her work with these community-driven projects led her to providing trainings and advisory services to donors, foundations and impact investment firms including institutions like the San Francisco Foundation and RSF Social Finance. Nwamaka has previously served as a fellow for the Center for Economic Democracy and the Movement Strategy Center. She proudly serves on the board of Thousand Currents and Restore Oakland, Inc.. Nwamaka is an advisor to the Equality Fund and Solidaire Network's [Black Liberation Pooled Fund](#). She graduated from UC Davis with a Bachelor's degree in Sociology and African American Studies and holds a Master's of Public Administration specializing in Financial Management from San Francisco State University.



Marlena Sonn



Marlena Sonn, CFP(r), serves as the Senior Strategist for Integrated Capital at Solidaire Network. Marlena collaborates with members, Board, staff, and movement partners to build community wealth via reparative, non-extractive investments. A veteran finance professional with 16 years of experience, she founded Amazonia Wealth Management, a New York City-based financial planning firm. Specialized in working with progressive, Ultra High Net Worth millennials, women, and family offices, Marlena provided the leadership in decarbonizing over \$1Billion in investments, flanking the movement demands from Standing Rock and the Divest/Invest campaign. She is proud of creating some of the most stringent environmental screens for publicly traded portfolios available, by not only excluding oil and gas companies, but also the major banks that finance climate destruction. In 2015, she was a recipient of the etsy.org Regenerative Entrepreneur fellowship, which supported her work piloting the first drawdown/GHG-negative portfolios offered to individual investors. Marlena is a widely cited expert on personal financial planning, having been featured on PBS's Nightly Business Report, Crain's, and guest lectures at institutions including New York University, New School of Social Research, SOCAP, and the Forum for Sustainable and Responsible Investment (US-SIF).