Global finance is an opaque landscape for individual investors. All too often, our investments can end up tied to socially and environmentally harmful industries, without our knowledge. How can we empower ourselves to act in this sphere, and direct our money toward profitable, progressive businesses?

ALIGN YOUR INVESTMENTS WITH YOUR VALUES!

Personal Portfolio Management 101 + Local Investing

One Day Workshop

If you long to operate with integrity in all parts of your life but feel underequipped or bewildered by the idea of aligning your investments with your values, this workshop is a chance to learn essential portfolio management skills and link your financial resources with local resilience.

Marco Vangelisti worked in the finance industry for 20 years and the investment management industry for the last 6. For 12 years, he taught Chartered Financial Analysts (CFA) in SF portfolio management, asset allocation, performance analysis and risk analysis. Marco is a founding member of Slow Money and has been on the leadership team of the Slow Money Northern California Network since 2009. He is a 100% impact investor with 8 years of experience doing direct local investments. He developed Essential Knowledge for Transition and speaks nationally as guest lecturer and author.

In this safe, supportive and constructive workshop you will:

» *Learn about the problems with global finance from an ex-insider*

» *Clarify your own values and build your personal investment compass*

» *Learn basic concepts of portfolio management and the tools to assess your liquidity and risk profile*

» *Learn to include non-financial considerations when evaluating investments*

» *Determine the prudent allocation of your portfolio to direct, impact or local investments*

» *Learn how to assess an investment opportunity's risk and alignment with your values*

» *Connect with a group of like-minded individuals interested in building a better world through their investments*

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EssentialKnowledge4Transition

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EK4T ESSENTIAL KNOWLEDGE FOR TRANSITION

// SCHEDULE //

9:00 – 9:30 Check-in, coffee and light breakfast

9:30 – 10:00 **Introductions**, Overview of workshop, learning objectives

10:00 – 10:40 **Talk**: The problem with global finance and business-as-usual investing
- My personal journey from conventional finance to regenerative finance
- Narrow lens of finance (risk/return/liquidity)
- The origin of investment capital and the bubble economy
- Investing and ecological limits

10:40 – 11:45 **Discussion and Activity**: From the global to the personal
- From greed and fear to biophilia and empathy
- Personal and portfolio transformation
- Clarify personal values: What problems would you rather NOT contribute to? What positive impacts would you like your investments to create?
- What non-financial returns are important to me?
- Create your Personal Investment Compass
- Talk and discussion: Towards a personally responsible solution

11:45—11:55 Break

11:55 – 12:45 **Basic Portfolio Management 101** – Understanding the Terms and Concepts
- Key concepts of portfolio management
- Risk
- Return
- Liquidity
- Self-assessment
- The portfolio perspective – diversification

12:45 – 1:30 Lunch break

1:30 – 2:00 **Shortcomings of traditional portfolio management**
- The chimera of Capital Markets Expectations
- Risk vs. fundamental uncertainty
- Insufficient diversification!

2:00 – 2:30 **Direct Investing I** – Determining prudent allocation
- What is direct investing?
- How much “livable future” insurance do you want to buy?
- A closer look at risk
- Determining prudent “risk budget” for direct investing

2:30 – 2:45 **The Bad, the Good and the Amazing**: a report from 7 years of direct, local and impact investing
- Financial and non-financial returns
- Financial and non-financial risks
- Lesson learned

2:45 – 3:00 Break

3:00 – 3:40 **Direct Investing II** – Due Diligence 101
- Professional due diligence
- A personal approach to direct investments – heart, mind, guts

3:40 – 4:10 **Practicum**: Hands on experience – practice your newly learned skills on actual investing offerings

4:10 – 4:40 **Discussion**

4:40 – 5:00 **Sharing**, connecting, feedback and closing