

AMA: Due diligence procedures, tips, & tricks for values-aligned investing

Thursday, April 4, 2024

1:00pm ET - 2:30pm ET

Resources & Offerings

\*referenced during the session

[Event Recording \(YouTube\)](#)

[Slide Deck](#)

### **LIFT Economy (Nairuti Shastry)**

LIFT Economy website: <https://www.lifteconomy.com/>

LIFT Economy's The Next Egg website: <https://www.lifteconomy.com/the-next-egg>

Newsletter sign-up: <https://www.lifteconomy.com/newsletter>

\*Discount information about The Next Egg: Curious to stay connected to the field and attend events like this in the future? [Join the Next Egg!](#) All event attendees today get a 30% discount on our monthly subscription (for a total of \$7/month) OR a 40% discount on our annual subscription (for a total of \$50/year).

### **Revalue (Angela Barbash)**

Revalue's website (newsletter sign-up at the bottom of the home page):

<https://www.revalueinvesting.com/>

### **Invest for Better (Janine Firpo)**

\*Read Janine's book, *Activate Your Money*. Purchase [here](#) or [here](#).

Follow Invest for Better via their [newsletter](#) or [LinkedIn](#)

\*Join Invest for Better: <https://investforbetter.org/membership/>

Learn more at Invest for Better's website: <https://investforbetter.org/>

### **Candide (Jasmine Rashid)**

\*Candide's website: <https://www.candidegroup.com/>

Newsletter sign-up: <https://www.candidegroup.com/contact-us>

A Medium article written by Jasmine as a precursor to her forthcoming publication, *The Financial Activist Playbook: A Guide to Strategies Big & Small for Moving Money for Racial Justice*:  
<https://medium.com/candide-group/the-financial-activist-playbook-for-supporting-black-lives-fb9616470c4>

\*Pre-order Jasmine's book:

<https://bookshop.org/p/books/the-financial-activist-playbook-8-strategies-for-everyday-people-to-reclaim-wealth-and-collective-well-being-jasmine-rashid/20990999?ean=9781523006366>

\*Guiding questions from Jasmine:

- ❖ What is the risk of NOT supporting this investment?
- ❖ What are the potential returns (beyond financial) for real change in communities?

### **Opportunity Main Street (Jenny Kassan)**

\*Opportunity Main Street's website: <https://www.opportunitymainstreet.com/>

Newsletter sign-up:

<https://opportunitymainstreet.us20.list-manage.com/subscribe?u=4ae1d523a86c4592d3cb74e49&id=db145e6200>

The Kassan Group's website: <https://www.jennykassan.com/>

\*Jenny's book (*Raise Capital On Your Own Terms: How to Fund Your Business Without Selling Your Soul*): <https://www.jennykassan.com/coytbkr/>

### **National Coalition for Community Capital (Katharine Gilman)**

NC3's website: <https://www.nc3now.org/>

The Main Street Journal (NC3's newsletter):

[https://mainstreetjournal.substack.com/subscribe?utm\\_source=menu&simple=true&next=https%3A%2F%2Fmainstreetjournal.substack.com%2F](https://mainstreetjournal.substack.com/subscribe?utm_source=menu&simple=true&next=https%3A%2F%2Fmainstreetjournal.substack.com%2F)

Community Investment Fund Handbook:

<https://www.nc3now.org/uploads/1/4/0/1/140134350/community-investment-funds-final.pdf>

Community Capital Toolbox: <https://www.nc3now.org/community-capital-toolbox.html>

## Full Spectrum Group & Full Spectrum Capital (Taj James)

Full Spectrum Capital Partners: <https://www.fullspectrumcapitalpartners.us/>

Full Spectrum Labs: <https://fullspectrumlabs.org/>

\*DAF Program: Movement Strategy Center + Full Spectrum Impact:  
<https://movementstrategy.org/philanthropic-services/>

Blueprint Collaborative: Impact Investing Marketplace: <https://blueprintcollaborative.org/>

\*Guiding questions from Taj:

- ❖ What do I need to thrive?
- ❖ How do I make sure that the money I have invested is doing things I want it to do? And NOT doing things I don't want it to do?
- ❖ What money do you need back and when? (i.e. returns within a context of extraction)
- ❖ How do I shift my assets (from Wall Street to Main Street)?

## Additional Resources:

### *Continued (un)learning*

- ❖ \*[Community Capital Infrastructure](#)
- ❖ \*What is an “[asset class](#)”?
- ❖ \*the [ultimate guidebook](#) on self-directed IRAs (SDIRAs)
- ❖ \*more on SDIRAs from [RocketDollar](#)
- ❖ \*on [SDIRA custodians](#) from The Next Egg
- ❖ \*on [rollovers](#) from The Next Egg
- ❖ \*more on [revenue-based loans](#)
- ❖ \*[The Next Step for Investors: Revenue-based Financing](#), by Luni Libes
- ❖ \*[research from Raj Chetty](#) that Jenny referenced
- ❖ \*[The Most Important Thing: Uncommon Sense for the Thoughtful Investor](#), by Howard Marks
- ❖ \*[Local Dollars. Local Sense: How to Shift Your Money from Wall Street to Main Street and Achieve Real Prosperity](#), by Michael Shuman

### *Other values-aligned supporters*

- ❖ [ImpactAlpha](#) (to find direct investment opportunities)
- ❖ [Main Street Journal](#) (to find direct investment opportunities)
- ❖ \*[Transformative25 \(T25\)](#) (to find fund-based investment opportunities)
- ❖ \*[ImpactPHL](#) (in Philadelphia)
- ❖ \*[Slow Money](#) (find a local group [here](#))
- ❖ \*[Debt Collective](#)

- ❖ [\\*Virtual March to Retire Big Oil](#)
- ❖ [\\*National Giving Circle Network](#)

#### *Values-aligned workplace plans*

- ❖ [\\*Just Futures](#)
- ❖ [\\*Carbon Collective](#)

#### *Investment advisors*

- ❖ [\\*Natural Investments](#)
- ❖ [\\*Realize Impact](#)
- ❖ [\\*Impact Assets](#)
- ❖ [\\*Movement Strategy Center](#)
- ❖ [\\*Heading for Change](#)

#### *Investment opportunities*

- ❖ [a curated list of opportunities](#) from Next Egg members
- ❖ [Steward](#) (featured on a [Next Economy Now podcast](#))
- ❖ [Raise Green](#) (featured on a [Next Economy Now podcast](#))
- ❖ [Salish Sea Cooperative Finance](#) (invested in by two Next Egg members)
- ❖ [Black Farmer Fund](#)
- ❖ [Cooperative Fund of the Northeast](#)
- ❖ [Equal Exchange](#)
- ❖ [Ujima Fund](#)
- ❖ [Potlikker Capital](#)
- ❖ [Real People's Fund](#)
- ❖ [Green Canopy NODE](#)
- ❖ [\\*East Bay Permanent Real Estate Cooperative](#)
- ❖ [\\*US Equal Exchange](#)
- ❖ [\\*Veridian at County Farm](#)
- ❖ [\\*in public markets: Adasina Social Capital](#)
- ❖ [\\*in public markets: Change Finance](#)
- ❖ [\\*Nia Capital's NIAGX](#)