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## PROFESSIONAL EXPERIENCE

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### Colorful Capital

#### CO-FOUNDER AND GP (2022 TO PRESENT)

- Co-founded new venture capital firm Colorful Capital. Colorful Capital brings capital support to enterprises founded and led by members of the broad LGBTQ+ community. By filling financing gaps and overcoming detrimental heuristics, we intend to bridge divides and strengthen economic opportunity.
- Co-author a regular column on NASDAQ.com

### High Meadows Institute (HMI)

#### FELLOW (2019 TO PRESENT)

- Actively consult with HMI on the development and finalization of the manuscript for the *21<sup>st</sup> Century Investing: Redirecting Financial Strategies to Drive Systems Change* book.
- Engage HMI as appropriate in meetings and consultations following the release of the book.
- Produce blog posts, webinars, and roundtables to engage the field on book-related progress, updates, and research questions.

### The Investment Integration Project (TIIP)

#### CO-FOUNDER AND CEO (2015 TO PRESENT)

- Develop and refine business plan, including budgets with projected income and expenses.
- Provide oversight of public relations, social media, and the TIIP network.
- Oversee the development of appropriate information technology platforms.
- Identify, recruit and retain staff members.
- Design and direct TIIP's research agenda, developing budgets and scope of work for each project.
- Lead consulting practice and help clients to understand the impact investing and sustainable finance field and innovations, analyze potential opportunities, and identify strategic implications.
- Aid clients with surfacing opportunities across a range of sectors, thematic areas, and structures.
- Assist clients with showcasing impact-related opportunities with key stakeholders so as to generate awareness and increase demand.
- Provide clients with action-oriented insights that accelerate uptake of promising solutions with key stakeholders.
- Provide oversight for the project management of research and consulting projects and work closely with staff on their execution.
- Author, co-author or advise on all TIIP publications.
- Provide outstanding professional representation for TIIP, demonstrating industry leadership and a compelling vision for system-level investing at events, conferences, client presentations, and other external engagements, including: the Council of Institutional Investors (CII), Morningstar Sustainable Investment Forum, CFA Institute, PRI in Person, the GIIN Investor Forum, Clinton Global Initiative, Investments and Wealth Institute, Financial Advisor & Private Wealth, the US Federal Reserve, the Money Management Institute (MMI), and Southeastern Council of Foundations to name a few.
- Lecture on sustainable, impact, and system-level investing at Columbia University, Georgetown University and New York University.

### Impact Economy (North America)

#### CO-FOUNDER AND MANAGING DIRECTOR (2012 TO 2014)

- Developed a business plan to establish and position a global impact investing and strategy firm in North America; led the effort to grow the firm's operations, including developing targeted and

new service offerings, marketing and business development.

- Built a network of independent contractors and consultants (e.g., third-party experts, strategic partners, and research assistants) specializing in consulting, empirical research, impact evaluation, and investment services; successfully managed and deployed a 3-person team across a series of projects.
- Originated and supervised all projects, created and implemented detailed timelines and schedules, developed processes to track contracts, conducted internal and external reporting, developed and shepherded new proposals, and managed budgeting.
- Conceptualized, organized, and implemented two editions of the Impact Economy Symposium & Retreat, an invitation-only gathering designed for asset owners and executives looking to accelerate their businesses, philanthropy and investments; over \$10 billion in assets were represented amongst the group of attendees at the 2014 edition.
- Managed, wrote, edited, and produced industry-leading reports, white papers and other published materials that generated new insights and helped to shape sectors.

### **Johns Hopkins Center for Civil Society Studies**

#### **SPECIAL INITIATIVES MANAGER (2008 TO 2012)**

- Initially hired in 2009 as the Manager of the New Frontiers of Philanthropy Project (was subsequently promoted); also served as a Graduate Research Assistant for the Center in the Fall of 2006.
- Raised \$270,000 for the New Frontiers of Philanthropy Project. Maintained budget, including drafting reports to funders, developing budgets, contributing to proposals, and leading sponsorship initiatives.
- Managed the production of the *New Frontiers of Philanthropy*, a book that pops the hood on developments underway at the edges of philanthropy and social investing, and provides a new level of insight into the engine powering this new era of social-purpose finance; identified and recruited a 17-person international “Blue Ribbon” Advisory Committee and 25 external author teams.
- Managed the activities of two research assistants and an administrative assistant, and coordinated efforts with a communications team; evaluated quality and focus of manuscripts received for the book, negotiated with author teams to implement substantive editorial changes, and mediated between the project, publisher, stakeholders and author teams through all stages of manuscript preparation.
- Raised \$250,000 for the Philanthropication thru Privatization Project and developed the strategy for the project’s second phase, which included the identification and recruitment of an international research team of leading scholars and practitioners; the goal of this ongoing work is to help build philanthropic wealth in underdeveloped regions of the world as a byproduct of the privatization of state-controlled assets.
- Built infrastructure of distribution channels and partners for implementing and influencing audiences globally, with the aim of more stakeholders entering the field and current players reaching for new collaborations.

### **Venture Philanthropy Partners (VPP)**

#### **ASSOCIATE (2007 TO 2008)**

- Assessed investment results and impact of VPP’s investees, which resulted in the production of a portfolio performance report on VPP’s first fund entitled “VPP Performance Culture: A Survey of Our Portfolio One Investments in Organizations Serving Children and Youth”—this was a \$31.4 million fund that leveraged an additional \$33.9 million in funds.
- Authored and distributed a bi-weekly briefing to high net-worth individuals.
- Wrote quarterly reports on portfolio investments and developed talking points and background briefings for CEO.

- Researched prospects for capital campaign and assessed potential investment opportunities.
- Facilitated discussions between senior staff on investment selection and strategy.

## ADDITIONAL EXPERIENCE

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### US Federal Reserve Bank of San Francisco

VISITING SCHOLAR (2014 TO 2016)

### Cornerstone Capital Group

MEMBER OF GLOBAL ADVISORY COUNCIL (2014 TO 2021)

### BizShanghai

SHORT-TERM EDITOR (2005)

### United Kingdom Parliament

RESEARCH ASSISTANT (2004 TO 2005)

### The Perry Institute for Marine Science – Washington, DC

SPECIAL ADVISOR (2003 TO 2004)

## SELECT PRESS AND PUBLISHED ARTICLES

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Burckart is a recognized thought leader in the field of impact investing, and specifically system-level investing. He has published dozens of articles in a variety of press on how investors can shift their practices to strengthen global systems, improve social conditions and create financial returns in the process.

- [Risk-management tool aren't equipped for climate change and other systemic shocks. This is what ESG investors need to be ready.](#) (MarketWatch, July 2022)
- [Focusing Solely on Net-Zero Targets Ignores Broader Threats](#) (FundFire, May 2022)
- [System-level Investing Generates Long-Term Returns](#) (Sustainable Finance Podcast, 2022)
- [Where we are and where we're going in the transition to system-level investing](#) (ImpactAlpha, 2022)
- [Interview - TSLA, PEP: Importance Of Diversity In ESG Investing](#) (TD Ameritrade Network, 2022)
- [Interview – Driving Systems Change](#) (Barron's Live, 2021)
- Co-authored [For a healthier society, we need more system-level investing](#) (Pioneers Post, 2021)
- [Sustainable Investing: System-Level Thinking and Financial Advice](#) (WealthManagement.com, 2021)
- Co-authored [Impact Investing Can Help Foundations Avoid Obsolescence](#) (Chronicle of Philanthropy, March 2015)
- [Curbing the "Impact Impostors": The growing movement toward transparency in impact investing](#) (NextBillion, January 2015)
- [Blurring the Boundaries: How impact investing is shifting paradigms in the public, philanthropic and nonprofit sectors](#) (NextBillion, November 2014)
- [Rational Exuberance: The momentum in impact investing is real – but so is the need for clarity about the changes \(and challenges\) underway](#) (NextBillion, November 2014)
- [Passing the Torch on Impact Investing: An introduction to the recently released book \*New Frontiers of Philanthropy\*](#) (Stanford Social Innovation Review, September 2014)

- [Investing Where The Clients Will Be](#) (Financial Advisor, 2021)
- Co-authored [Investment stewardship for system-level impact](#) (Responsible Investor, 2021)
- Co-authored [Five investment strategies to mitigate systemic risks before the next pandemic](#) (ImpactAlpha, April 2020)
- Co-authored [Finding the Right Asset Manager for Sustainable Investing: A Guide for Due Diligence](#) (NextBillion, February 2020)
- [Good for Investors, Good for Business: Helping Financial Advisors Embrace Sustainable Investing](#) (NextBillion, May 2019)
- Co-authored [Gender Discrimination Drives Income Inequality: How Impact Investors Can Respond](#) (NextBillion, December 2018)
- Co-authored [It's Time to Measure the Effectiveness of Investing in Global Goals](#) (NextBillion, April 2018)
- Co-authored [It's time to invest in the new circular economy revolution](#) (Responsible Investor, June 2017)
- Co-authored [Investors need to invest in the bigger picture: here's how the SDGs could fit the bill](#) (Responsible Investor, March 2017)
- Co-authored [Making systems-level investing a practical possibility](#) (Responsible Investor, November 2016)
- [We Need to Prove Impact Investing Makes a Difference](#) (Chronicle of Philanthropy, July 2015)
- [Impact investing needs a better way to measure impact](#) (Quartz, July 2015)
- [Bringing Impact Investing Down to Earth: Insights for Making Sense, Managing Outcomes, and Meeting Client Demand](#) (Money Management Institute, June 2015)
- [Impact Investing on the Cusp of Mainstream Wealth Management](#) (InvestmentNews, June 2014)
- Co-edited [New Frontiers of Philanthropy: A Guide to the New Tools and New Actors that Are Reshaping Global Philanthropy and Social Investing](#) with editor Lester M. Salamon (Oxford University Press, August 2014)
- [Making Impact Easier: How Impact Investing Can Put Capital Providers and Seekers on the Road to More Investible Deals](#) (Next Billion, July 2014)
- [Letting Loose the Crazy Uncle](#) (Stanford Social Innovation Review, June 2014)
- [Building a Bridge from Wall Street to Main Street: How Impact Investing Can Expand the Reach and Role of Community and Economic Development](#) (Federal Reserve, 2014)
- [Serving Client Demand for Impact Investing: A Hands-on Guide for Financial Advisors and Senior Management](#), published by Money Management Institute and Impact Economy (May 2014)
- [Sustainable Value Chains: Transforming the Apparel Industry](#) with Maximilian Martin (Stanford Social Innovation Review, December 2013)
- [Impact Investing: From Headlines to Fundamentals](#) with Maximilian Martin (Stanford Social Innovation Review, August 2013)
- [It's Time to Cut Through the Hype of Impact investing](#) (Chronicle of Philanthropy, August 2013)
- Co-edited [Status of the Social Impact Investing Market: A Primer](#) published by the United Kingdom Cabinet office and Impact Economy, June 2013)

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## ADDITIONAL RESEARCH AND PUBLICATIONS

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The Investment Integration Project was founded in 2015 by Burckart and Steve Lydenberg to help investors align their strategies and practices with the increasingly complex world of the 21st century. The publications that followed over the proceeding years have helped investors understand and adopt system level practices. These include:

- [Approaching the Tipping Point: Recommendations for building the marketplace for system-level investing](#) (2022)
- [Systemic Stewardship: Investing to Address Income Inequality](#) (2021)
- [Confronting Income Inequality: Practical guidance for how investors can address income inequality through action on labor relations, workers' rights, and financial and political equity](#) (2021)
- [21st Century Investing: Redirecting Financial Strategies to Drive System Change](#) (Published by Berrett-Koehler, 2021)
- [Addressing systemic social risk: A roadmap for financial system action](#) (Co-published with Moving the Market, 2020)
- [Climate Change in APEC: Assessing Risks, Preparing Financial Markets, and Mobilizing Institutional Investors](#) (Co-published with the World Bank, 2020)
- [Graduating from ESG to Systems](#) (Co-published with the Money Management Institute, 2020)
- [Assessing System-Level Investments: A Guide for Asset Owners](#) (2020)
- [Sustainable Investment Products and Due Diligence](#) (Co-published with the Money Management Institute, 2020)
- [Sustainable Investing in Japan: An Agenda for Action](#) (Co-published with the Sasakawa Peace Foundation, 2019)
- [Fundamentals of Sustainable Investing: A guide for financial advisors](#) (Co-published with the Money Management Institute, 2019)
- [Why and how investors can respond to income inequality](#) (Co-published with Principles for Responsible Investment, 2018)
- [Measuring Effectiveness: Roadmap to Assessing System-level and SDG Investing](#) (Co-published with IRRC Institute, 2018)
- [Investing the New Industrial \(R\)evolution: Insights for asset owners and managers financing the circular economy](#) (Co-published with Tonic, 2017)
- [Central Bank and Development Finance Institution Approaches to Investing in Global Systems](#) (Co-published with IRRC Institute, 2017)
- [Effective Investing for the Long Term: Intentionality at Systems Levels](#) (Co-published with High Meadows Institute, 2017)
- [System-level Considerations and the Long-Term Investor: Definitions, Examples, and Actions](#) (2017)
- [Tipping Points 2016: Summary of 50 Asset Owners' and Managers' Approaches to Investing in Global Systems](#), (Co-published with IRRC Institute, 2016)
- [Portfolios and Systemic Framework Integration: Towards a Theory and Practice](#) (2015)

Previously, Burckart has also contributed to the field through groundbreaking research, including leading a multiyear, ongoing field building effort focused on the US financial services industry in collaboration with the Money Management Institute; co-editing the *New Frontiers of Philanthropy: A Guide to the New Tools and Actors that Are Reshaping Global Philanthropy and Social Investing* (Oxford University Press: 2014), and co-editing the *Status of the Social Impact investing Market: A Primer* (UK Cabinet Office: 2013) that was distributed to policymakers at the inaugural G8-level forum on impact investing.

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## EDUCATION

**Barrett-Koehler 2019 Book Marketing Workshop –**  
Barrett-Koehler Publishers (2019)

**Hewlett Communications Academy –**

Spitfire Strategies (2012)

**Master of Public Policy (MPP)** – Concentration: Nonprofit Management –  
Johns Hopkins University (2006 to 2008)

**Bachelor of International Affairs** – Concentration: International Economics –  
The George Washington University (2002 to 2006)