



WORKSHOP FOR FAMILIES: IMPACT INVESTING AND STRATEGIC PHILANTHROPY

Tuesday, August 13th, 2013
Bogota, Colombia



LGT Venture Philanthropy



AGENDA

AUGUST 13TH 2013

9:00 – 9:30 AM

REGISTRATION

9:30 – 10:30 AM

STORIES OF FAMILY PHILANTHROPY: A CONVERSATION AMONG FAMILY MEMBERS

H.S.H. Prince Max von und zu Liechtenstein and participants will engage in a guided conversation about their philanthropic journey with their families. What role does philanthropy play? Which values and motivations are driving it? They will share their lessons learned, successes, failures, and the process of transition between generations.

10:30 – 11:15 AM

CREATING VALUE OUT OF ALMOST NOTHING

A creative challenge for participants to solve in teams: how to create value of almost nothing?

11:15 – 11:45 AM

Opportunity for Networking

11:45 – 12:45 AM

CASE STUDIES IN LATIN AMERICA (PART I)

Participants will work on four real Latin American case studies of social enterprises and non-profits that have been subject of impact investing. The group will act as a sounding board to four CEOs and Executive Directors to evaluate their achievements and advise them on the challenges and failures their organizations have faced.

- a) Felipe Vergara, Lumni (Regional)
- b) Benjamin Sandzer Bell, CO2 Bamboo (Nicaragua)

12:45 – 2:00 PM

LUNCH

2:00 – 3:00 PM

WORLD CAFE

Each table will offer participants the chance to explore specific topics such as “next generation philanthropy”, “impact declarations” or “family legacy”. Family members share how they got started, who is currently involved, what challenges they have faced, and their philanthropy roadmaps.

3:00 – 4:00 PM

OLD AND NEW WAYS OF CREATING IMPACT

This session will offer frameworks and perspectives to distinguish and compare various approaches to philanthropic giving and social investing. Participants will get an overview of traditional and modern approaches using a handful of simple criteria that will also help them position themselves on the philanthropy map.

4:00 – 4:30 PM

Opportunity for Networking

4:30 – 5:30 PM

CASE STUDIES IN LATIN AMERICA (PART II)

- a) Nathalia Mesa, Carulla Foundation – aeio Tu (Colombia)
- b) Dr. Patricia Wolff, Meds and Food for Kids (Haiti)

5:30 – 6:30 PM

CONCLUSIONS AND Q&A SESSION

6:30 – 7:00 PM

NETWORKING COCKTAIL

7:00 – 9:00 PM

DINNER

BIOGRAPHIES



H.S.H. PRINCE MAX VON UND ZU LIECHTENSTEIN

H.S.H. Prince Max von und zu Liechtenstein has been Chief Executive Officer of LGT Group since 2006. Prince Max started his professional career in 1993 as an investment analyst and associate at JPMorgan Partners in New York. After five years in the United States, he returned to Europe in 1998 to work for the private equity group IK as an Associate Director in London and Hamburg. In 2000, he rejoined JPMorgan Partners as a Director in London before becoming the Head of JPMorgan Partners' German office in 2003. H.S.H. Prince Max has an MBA from Harvard Business School and a degree in Business Administration from the European Business School. H.S.H. Prince Max initiated LGT Venture Philanthropy in 2007.



WOLFGANG HAFENMAYER

Wolfgang Hafenmayer is the Managing Partner of LGT Venture Philanthropy. Within the last five years, Wolfgang built a team of over 20 investment managers and philanthropy advisors on five continents to identify and support organizations with outstanding social and environmental impact.

Wolfgang gained rich experience in the industry as an investment manager with BonVenture, the first social venture fund in German-speaking Europe and helped set up Forma Futura, a sustainable asset management company. Previously, he was the executive director of the IT and management consulting firm Consileon and also worked for the consultancy Bain & Company.

During a trip around the world he interviewed 230 social entrepreneurs, politicians and scientists in 26 countries and recorded his findings in his book “The FutureMakers”. Wolfgang Hafenmayer holds a degree in economics from the University of St.Gallen, Switzerland.



FELIPE MEDINA

Felipe Medina currently leads the Transforming Philanthropy Initiative in Colombia. The purpose of this initiative is to create a community of strategic philanthropists and to facilitate collaboration and exchanges of best practices and lessons learned with the final objective of increasing the volume of effective social investments in Colombia. He spends twenty five percent of his time analyzing and researching philanthropy and social investment trends.

Mr. Medina is in the Board of Directors of Give to Colombia, NESsT, L'Atelier, and LASPAU. He is in the Board of Advisors of Lumni and LeapFrog Investments. He is part of the Steering Group of the Global Philanthropy Forum and a member of the Ashoka Support Network. Mr. Medina is a member of the Clinton Global Initiative.

Mr. Medina began his career in Goldman Sachs in 1990, managing assets for Latin American clients and formed the largest team in the region. Between 2000 and 2003, Felipe was Regional Director for Latin America Private Wealth Management. Currently, Mr. Medina manages relationships with the most influential families and individuals in the Region. He is a member of the Private Wealth Philanthropy Advisory Committee of Goldman Sachs. Mr. Medina has an MBA from Harvard Business School and a BS in Economics and Civil Engineering from the Massachusetts Institute of Technology.



NATHALIA MESA

Nathalia is CEO of Fundación Carulla – aeioTU, an organization providing quality holistic Early Childhood Development services in Colombia in the form of integrated education, nutrition and care. Starting with the inauguration of 4 centers in 2009, Nathalia has overseen aeioTU's rapid expansion to 18 centers in 5 years, presently serving over 6,000 children. Prior to leading aeioTU, Nathalia worked for the AVINA Foundation, gaining over 10 years' experience in promoting sustainable development in Latin America. Her work with AVINA focused on using business tools to develop social and environmental impact investment strategies with organizations working throughout Latin America. Nathalia has further worked with leading nonprofits in the social enterprise sphere, such as Ashoka and SEKN. Nathalia holds a degree in Economics from the University of Georgia.



BENJAMIN SANDSER BELL

Ben Sandzer-Bell, founder and CEO of CO2 Bambu, came to the world of impact entrepreneurship after a 20 year career in the global aerospace industry. A dual track career in manufacturing management and strategy for aerospace majors in Europe (Thales) and the U.S. (Boeing), led to a series of executive positions in Japan, Europe and the U.S. Over the past 10 years, his key focus was on elaborating and executing strategies that would enable his organizations to have positive environmental impact - by focusing on carbon emission reductions in the aviation industry. By 2008, he opted to make environmental impact the heart of his professional endeavors, and created CO2 Bambu, a company focused on the design, manufacture and assembly of eco friendly BoP housing. In 2010, after Haiti's earthquake and devastating hurricanes in Nicaragua, he added

further focus on BOP housing and post disaster reconstruction that is environmentally sound. To achieve this vision, LGT Venture Philanthropy and other impact investors injected capital into CO2 Bambu to fund the company's growth. This impact investment facilitated the launch of the Nicaraguan bamboo industry, through NGO and World Bank funded contracts to build over 150 bamboo-homes for post hurricane eco-refugees. In 2012, Sandzer-Bell developed a strategy to bring to market a low cost, flood-resilient amphibious houses that will be a significant contribution toward a higher level of resilience in developing countries plagued by climate-change related flooding events, thus evolving his focus from Climate Mitigation to Climate Adaptation Solutions.



FELIPE VERGARA

Felipe Vergara President Co-Founder and CEO Lumni Inc. Former consultant McKinsey & Company in New York, MBA "The Wharton School of Business", Industrial Engineering, University of Los Andes in Colombia. He has taught at Wharton, MBA from Universidad Adolfo Ibáñez, Chile and the Universidad de Los Andes in Colombia. Social Investment was elected Ashoka Fellow (2006), was chosen by Bloomberg Business Week Magazine as one of the 25 most promising social entrepreneurs in the United States (2009), Endeavor Entrepreneur (2009), received the Social Entrepreneurship award for Latin America World Economic Forum (2011).



DR. PATRICIA B. WOLFF

Dr. Patricia B. Wolff is the founder and Executive Director of Meds & Food for Kids (MFK), a social benefit non-profit enterprise dedicated to preventing and treating malnutrition in Haiti. MFK makes a Ready-to-Use Therapeutic Food, Medika Mamba, the global gold standard for treating childhood malnutrition, in Haiti, with Haitian labor, and, where possible, with Haitian ingredients.

Dr. Wolff introduced this revolutionary treatment into Haiti in 2003; since then MFK's Medika Mamba has saved the lives of over 72,000 children. By locating production in Haiti, MFK also addresses some of the root causes of malnutrition - unemployment and poverty - by creating jobs, training professionals and sponsoring long-term agricultural development. Dr. Wolff received her B.A. and M.D. degrees at the University of Minnesota, and on graduation worked for the Indian Health Service in South Dakota. After a residency at Washington University School of Medicine, she worked as a pediatrician in the St. Louis area for 35 years. In 1996, she became President of Forest Park Pediatrics, P.C., where she worked until the summer of 2011, when she resigned to focus completely on Meds & Food for Kids. She is a Professor of Clinical Pediatrics at Washington University School of Medicine, and has been listed in the U.S. News & World Report of Best Doctors every year since 2002. As a volunteer Executive Director of Meds & Food for Kids, she divides her time equally between St. Louis and Haiti.

THE HOSTS



LGT Venture Philanthropy

LGT Venture Philanthropy was founded to increase the quality of life of less advantaged people. It is based on the conviction that all human beings should be able to live under dignified conditions and be given a fair chance for personal development in their lives. To realize its mission, a team based in six regions across the world selects and supports organizations with outstanding social and environmental impact. With tailored financing, management know-how and relevant networks LGT VP help them grow and scale their impact.

LGT VP also advises clients for their own philanthropic engagement and inspires people by telling the stories of effective solutions to global challenges. The broad range of clients benefit from the team, experience, processes and networks built to realize the philanthropic engagement for the Princely Family of Liechtenstein and LGT.

www.lgtvp.com



In 2010, **Filantropía Transformadora (FT)**, was created as an initiative that seeks to promote and facilitate collaborative and strategic social investment amongst Colombia's leading families and economic groups, build on the capacity of the social sector, and motivate public-private partnerships to achieve high social impact. Indeed, this initiative achieves its core objective of promoting and increasing social investment, motivating its participants to increase their flow of social investment, facilitate social investment mechanisms, the latest tools and best practices, offers a network of strategic philanthropists, provides opportunities for collaboration and thus, creating an attractive ecosystem and track record for foreign social investment in Colombia.

The initiative includes different formats of learning where participants, older and younger generations, explore innovative approaches to maximize the social impact of their investments and become social investors who, under a theory of change model, commit to supporting long-term impact driven interventions.

www.filantropiatransformadora.or



CONTACT

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All workshop participants must adhere to the strict “no fundraising and no solicitation of business” policy.

Thank you.