

AERIS® IMPACT MANAGEMENT ASSESSMENT & CERTIFICATION

An independent assessment of a fund manager's ability to deliver promised impact that assures investors that their capital is working to achieve the impact they seek.

The Aeris Impact Management Assessment and Certification provides transparency into a fund manager's:

- ✓ **Investment strategy**, what is the desired impact and who are the intended beneficiaries.
- ✓ **Portfolio investment alignment**, including how investments are qualified relative to the desired impact.
- ✓ **Post-Investment impact measurement, monitoring, and management systems/processes.**
- ✓ **Use of impact data** by management and leadership to evaluate impact investment strategy.
- ✓ **Investment exit strategies**, if applicable, and impact sustainability.
- ✓ **Investment leadership and corporate responsibility**, including other corporate activities that contribute to impact.

Aeris' approach is grounded in more than 15 years of practice, gaining the confidence of large and small institutional investors.

The Assessment provides investors with in-depth understanding to support their due diligence and helps asset managers gain insights into stronger impact measurement and management practices.



AERIS

Aeris is a rating and information service for impact investors.

Our mission is to accelerate the pace of impact investing by bringing accountability, transparency and standardization to investment practices.

Our business is:

Impact management assessments that evaluate the investment systems and practices of fund and asset managers relative to stated impact theses or mission.

Software solutions that enable impact investment managers to collect and analyze impact and financial performance data on investment portfolios and underlying assets.

Ratings and data services on community development funds (CDFIs) that support investors' due diligence and ongoing monitoring.

For additional information:

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