



mavia - your trusted philanthropy and social finance advisor




# Passion for Impact



Why do we engage ourselves? Because...

- ... over a billion people live each day on less than the cost of a McDonald's Big Mac
- ... 1 in 5 adults would not be able to read or write these lines
- ... more than 9 million children under the age of 5 die each year. Two-thirds of these deaths – more than 6 million every year – are preventable
- ... 12% of the world's population, do not have access to safe water
- ... 2.5 billion people, about 40%, in the world do not have access to adequate sanitation

 **mavia is passion for impact - we believe that together we can make a real difference**



# mavia - your partner of choice

mavia  
*Passion for  
Impact*

- mavia is an independent philanthropy and social finance\* advisor in Zurich
- We increase the positive impact of our clients' money by providing them with independent and personal advice with access to a unique network
- We believe that together and in collaboration we can make a real difference

Professional  
and  
independent

- Our profound know how and expertise is based on years of first hand work experience with the leaders of the industry
- We see our independence as the basis for a trusted and open relationship with our clients and partners
- We are fully transparent and conduct our business in line with our clients' interests

Personal

- We understand that our clients want to experience philanthropy as a way of engaging personally; understanding their own needs and interests
- Our clients want to be part of a meaningful journey and derive pleasure from creating positive impact for others and themselves
- We develop a personal profile, derive a tailored strategy and manage client engagements

Connected

- mavia is a trusted single entry point to a unique network providing clients with interesting engagement opportunities – this leverages their time and efforts in creating positive impact

# mavia – professional, experienced and passionate



## **Nathalie Moral**

### **My „Passion for Impact“ is:**

«to transform good intention into a meaningful journey creating value for one self and others along the way.»

### **Professional experience**

- Formation of mavia Passion for Impact in 2012, philanthropy and social finance advisor
- 4 years Impact Investing / Venture Philanthropy at LGT Venture Philanthropy
  - Buildup and management of the advisory team for private clients plus responsibility for the respective client portfolios
  - Customized advice and workshops for private and institutional clients
  - Buildup and fundraising of the Impact Investment Funds of LGT Venture Philanthropy ~USD 30M
  - Buildup of the investment portfolio of the Princely Family of Liechtenstein in Latin America
  - Support as Fellow at the Escuela Nueva Foundation in Colombia, especially in issues of expansion strategy and financial planning
- 5 years Management Consulting at Bain &Company in Switzerland and PricewaterhouseCoopers in London



# mavia – professional, experienced and passionate

## Advisory Board



### Monica Vögele

President of Vögele Kulturzentrum

#### My „Passion for Impact“ is:

«To put thoughts into action and to start in the little what can become big.»



### Magda Streuli- Youssef

Dr. iur., Attorney at Law, Partner at Walderwyss

#### My „Passion for Impact“ is:

«To share the spirit of philanthropy and to make a contribution to realize philanthropy projects.»

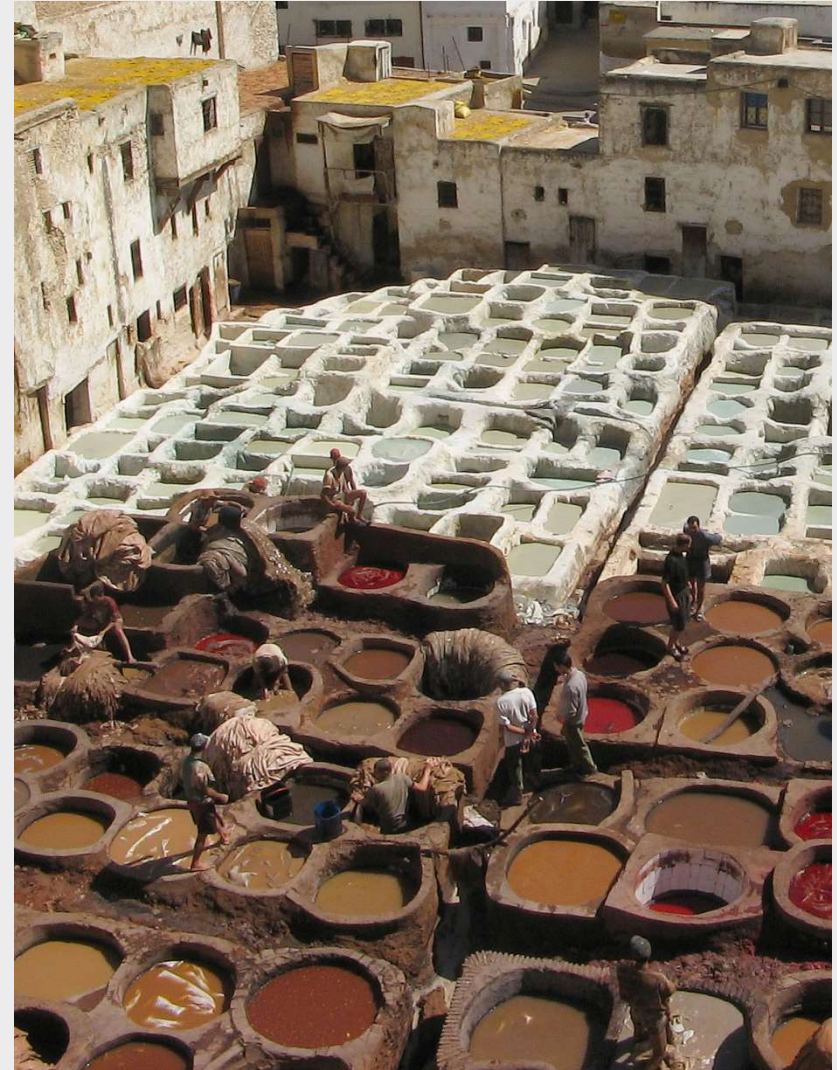
## Partner



### Kurt Moosmann

Moosmann Advisors Ltd.

«The true essence of my client relationships is built on a profound sense of trust, responsibility and authenticity, as well as on a respectful amount of scrutiny.»



# mavia your trusted philanthropy and social finance advisor

## Mission

- We strive to **increase positive impact** for our clients and their beneficiaries by bridging the gap between people wanting to engage in positive change and high quality implementers providing social investment and philanthropy opportunities
- We offer you **independent, professional and personal advice** in strategic philanthropy and social finance. By giving open and direct advice we create strong and trusted relationships, **ensuring consistency and mission alignment** in each step of your philanthropy journey


## Vision


- A world where positive impact and sustainability for one self, others and the environment is not an alternative but a fundamental understanding that drives decisions and choices in every day life








# Our values


 **Respect and dignity**  
for one self, others and the environment

 **Independence**  
the basis for a trusted and open relationship with our clients and partners

 **Collaboration**  
because one plus one equals more than two

 **Growth**  
personal and professional growth as driver for improvement and change

 **Joy**  
in creating and enjoying positive impact for others and ourselves through our work

 **Integrity and trust**  
we do what we say and act according to our values



# Our clients have different needs

## Private clients wish...

- to give during their lifetime in order to experience the results their engagements create
- to know about their options ranging from traditional philanthropy, to sustainable investing, impact investing and how this all fits into a strategic asset allocation
- to experience philanthropy and social investing as a way of engaging and bringing together the family around common values
- to be part of a meaningful journey and gain pleasure from creating positive impact for others and themselves



## Institutional clients need...

- to consider all their stakeholders and conduct their business in a responsible and sustainable way
- to find new ways to further build on existing client relationships and to stay the trusted partner
- to explore new ways of differentiating themselves from competition and to establish new client relationships
- to implement new initiatives strategically and in line with their current business strategy and brand

## Foundations need...

- to adhere to their mission at all times
- to maximize the positive impact of their money (considering the endowment and program/project funding )
- to be transparent and report about their funding and impact
- to find new ways how to leverage the impact of their money, as challenges are bigger than the available money
- to be efficient in their processes and as lean as possible
- to evaluate their funding and investment strategy on a regular basis





## mavia offers tailor-made solutions

### Private clients

- We carefully listen and discuss with you your concerns, providing you with a strategic plan and overview of required resources for the overall success of your philanthropic engagements
- In order to meet your philanthropy and social finance needs, we help you to find the right partners
- If requested, we define a clear reporting process so you can follow the progress of your engagements on a regular basis and fully informed

### Institutions

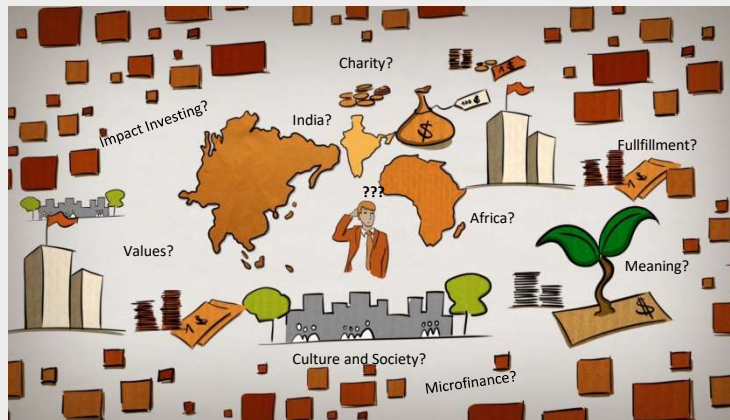
- mavia helps institutional clients to define and conceptualize their philanthropic and social finance engagement/programs including innovative funding models such as impact investing
- We help to provide the best possible philanthropy and social finance services for end-clients
- We support in evaluating existing program strategies and help to professionalize processes

### Foundations

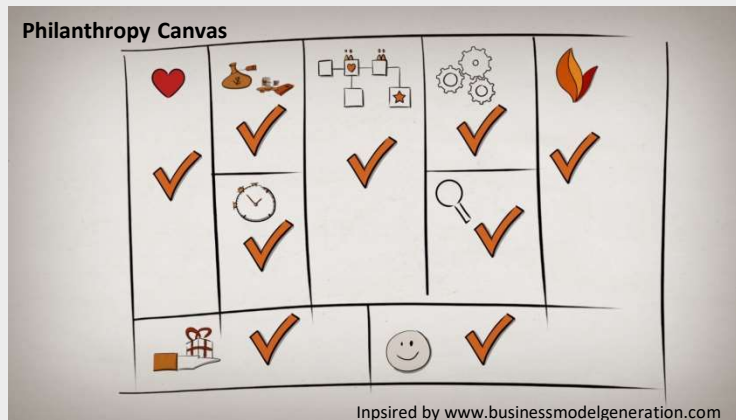
- mavia accompanies and structures the building process of foundations, from establishment up to implementation of everyday foundation work
- In case of reorientation and change situations we introduce structure, clarity and provide possible proposals of implementation, which transform needs and ideas into concrete action
- In case of innovative funding models (e.g. Program Related Investing PRI, Impact Investing, etc.) mavia helps to formulate and implement the adequate strategy

# Private clients: From confusion to understanding

1) How do I choose the right thing for me from the vast amount of opportunities?



2) I understand the different choices and what matches my profile



3) I am connected to partners and opportunities and create positive impact





## Private clients: Your personal impact journey has 3 main steps

**You decide** who your partners are and what your engagements will be

**You are flexible** to engage at any point of the process depending on your previous experience and needs

**You are free** to decide at each point in time to continue your journey on your own

- Continuous management of your impact engagements through mavia or implementation partners
- Monitoring the development of your impact engagements
- We provide you periodically with updates on your engagements' progress



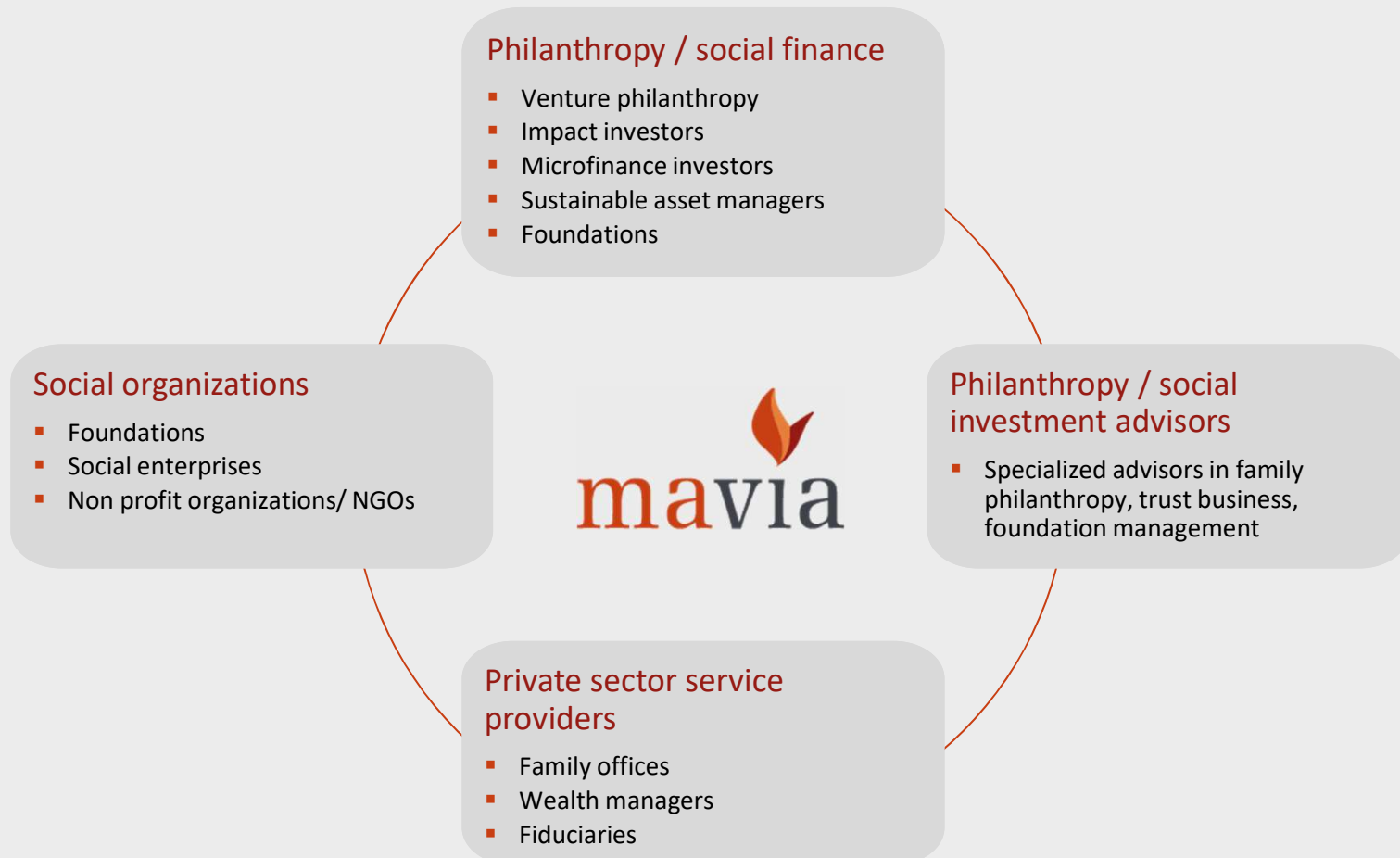
- Together we develop your personal profile that is built upon your values and your motivation
- We derive your personal strategy on creating impact based on your profile

- We propose possible partners out of the trusted mavia network
- We evaluate new potential partners for you
- We negotiate your personal agreements based on our expert knowledge



# mavia has an extensive network of service providers and manages these relationships for you

Through our network you have access to a unique combination of service providers and this via a single point of entry







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