

SOCIAL VENTURE PARTNERS



BUSINESS PARTNER PROPOSAL

GOING BEYOND PHILANTHROPY

Social Venture Partners offers an innovative model of engaged philanthropy to our community and to Cordant Wealth Partners and its employees. We mobilize individuals, businesses, and foundations to leverage financial resources, expertise, and social capital in pursuit of sustainable solutions to intractable community problems. Our investments simultaneously build passionate, strategic, and engaged philanthropists (SVP “Partners”), while achieving impressive results for our community’s children by strengthening nonprofits and catalyzing system innovation. Our current goal is to ensure that all children in the Portland metro area enter kindergarten with the foundation for learning and life success.

SVP’S COMMITMENT TO YOU

We are committed to establishing a mutually beneficial relationship with you as a Business Partner. There are several ways in which Social Venture Partners could support your efforts.

MARKETING AND PUBLIC RELATIONS

- Brand visibility for Cordant in Encore Fellows-focused outreach, especially to prospective and current Intel Fellows
- Brand visibility for Cordant in general SVP marketing, website, and internal communications
- Connections to strategic sponsorship opportunities with SVP nonprofit partners

HUMAN RESOURCES/PROFESSIONAL DEVELOPMENT

- Employee access to meaningful skills-based volunteerism that yields positive employee relations, team building, and retention
- Leadership development opportunities for Cordant professionals in their 20s and 30s through our Rising Leaders for Social Good program (additional \$2,500 fee)
- Retirement planning and benefits (Encore Fellows program)

SHARED VALUE

- Cohort one or more live webinars focused on purpose-driven retirement planning
- Cordant featuring SVP as a key community partner to its customers/clients
- Information and access to high-performing education-focused nonprofits for Cordant giving, employee volunteer service (boards, committee, and strategic projects)
- Nonprofit service training (eg. Boardmanship, nonprofit finance, smarter giving) for Cordant stakeholders
- Supplier and customer engagement, as desired

OUR PARTNERSHIP

We invite Cordant Wealth Partners to become an SVP Business Partner. In this model, two Cordant employees would serve as SVP Partnership point people, accessing all of the standard rights, benefits, and experiences available to our Partnership (with other employees engaged as desired/interested). We suggest that one of these two Partners be a principal in the firm.

Cordant will gain access to the human resources, marketing, and shared value components noted above, while learning about and engaging in a venture philanthropy model that could be scaled to reach more of your employees and clients.

This Business Partnership includes a total annual contribution of \$5,000 and the development and implementation of at least two educational sessions that include our Encore Fellows program: one on financial planning for a purpose-driven retirement and one more generally on purpose-driven retirement options. We hope that you will also consider promoting SVP as a key community partner of Cordant Wealth Partners in support of our mission.

We believe this Partnership is only the beginning of the mutual benefit we can provide one another. As Cordant continues to grow and further develops its philanthropic strategies and initiatives, we hope this partnership can grow and develop as well.



BECOME A BUSINESS PARTNER TODAY

Cordant's Custom Investment:

- \$5,000
- 2 "Encore" learning sessions

- Additional _____

Engagement Opportunities:

- Business Planning
- Strategic Facilitation
- Financial Management/Planning
- Explore other options

The above engagement opportunities are samples; all engagement opportunities can be customized based on skill and interest.

Business Name: Cordant Wealth Partners

Business Partnership Contact: _____

Billing Address: _____

Primary Contact Telephone: _____

Primary Contact Email: _____

Giving Options:

- One-time payment
- Quarterly payments with invoices
- Monthly payments with invoices

Credit/Debit Card Authorization

- Visa Card No.: _____
- Master Card Expiration Date: _____ CVC: _____
- AMEX Signature: _____