



CROATAN
INSTITUTE

REEFS: RACIAL EQUITY, ECONOMICS, FINANCE, & SUSTAINABILITY

Total Portfolio Activation Tools for Racial Equity Investing

The United States is at a crossroads. The combination of COVID-19's disproportionate impact on black and brown lives and the brutal murder of George Floyd has served as a lightning rod for addressing America's dark history of repression of its minority populations. While protests are a powerful force for ramping up the dialogue and pushing policy change at the local, state and federal levels, asset owners and investors have an equally powerful role to play. The REEFS Total Portfolio Activation Tools will help investors leverage their control over capital and their voice to grow racial equity by increasing opportunities for quality jobs, building financial resilience, and expanding entrepreneurial pursuits in black and brown communities.

Croatan Institute is seeking sponsors in support of its REEFS Program.

Over the next 12-18 months, the Institute will be conducting a comprehensive analysis of how investors can take action across their portfolios to address racial equity, using our established Total Portfolio Activation (TPA) and Invest-Engage frameworks.

It is crucial to advocate for change. We believe that anti-black racism and discriminations of all forms can be significantly influenced by a community of investors positioned to leverage their portfolios to accelerate equity in the United States. Investors in pursuit of a racial equity dividend need actionable resources to allocate capital and improve their investor engagement strategies.

Sponsorship supports these innovative opportunities and gives mission-aligned partners recognition during the research process, at the time of release, and during online and in-person events. Please join us in creating these invaluable resources to help investors learn how to activate their investments for racial equity.

SPONSORSHIP OPPORTUNITY

**Help deliver critical
resources to grow racial
equity.**

**Contact Sharlene Brown
to discuss becoming a
sponsor:**

sharlene@croataninstitute.org

RACIAL EQUITY, ECONOMICS, FINANCE & SUSTAINABILITY (REEFS)

SPONSORSHIP BENEFITS		PATHFINDER \$30,000	ACCELERATOR \$20,000	COLLABORATOR \$15,000	BUILDER \$10,000	COMMUNITY \$5,000
# OF SPONSORS	1	2	3	4	unlimited	
PUBLICATION: TPA FOR RACIAL EQUITY INVESTING						
Listing of sponsors included in materials	LARGE LOGO	MEDIUM LOGO	SMALL LOGO	NAME	NAME	
Website recognition	LARGE LOGO (with hyperlink)	LARGE LOGO	MEDIUM LOGO	SMALL LOGO	NAME	
Pre-release private briefing	●	●	●			
Sneak-peak of materials, opportunity for feedback	●	●				
PUBLICATION: INVEST-ENGAGE FOR RACIAL EQUITY INVESTING						
Listing of sponsors included in materials	LARGE LOGO	MEDIUM LOGO	SMALL LOGO	NAME	NAME	
Website recognition	LARGE LOGO (with hyperlink)	LARGE LOGO	MEDIUM LOGO	SMALL LOGO	NAME	
Pre-release private briefing	●	●	●			
Sneak-peak of materials, opportunity for feedback	●	●				
CROATAN CONVERSATIONS ON RACIAL EQUITY INVESTING						
Public release recognition	LARGE LOGO	MEDIUM LOGO	SMALL LOGO	NAME	NAME	
Acknowledgment at all investor events	●	●	●			
Social media promotion	●	●	●	●	●	
REEFS ROUNDTABLE (Fall 2021)						
Opening Greeting	●					

*Croatan Institute Founders Circle members will receive a 10% discount on all sponsor levels.

**REEFS Sponsors will receive a 10% discount to the Croatan Forum at the time of ticket purchase.

Contact Sharlene Brown for more information at
sharlene@croataninstitute.org



CROATAN
INSTITUTE