

Mandate for FaithInvest

- A. Our strengths:** beliefs, commitments and the gifts of diversity.
- B. Our aims:**
- To secure our shared commitment and plan;
 - To achieve tangible co-operation toward creating a fundable and sustainable faith-consistent investment alliance, to be known as FaithInvest;
 - To lead transformation and to open up collaboration.
- C. Our undertaking:** We commit to co-operate and create a fundable and sustainable alliance to assist faiths to collaborate on globally transformative faith-consistent investment.

The following points and key issues form the agreed agenda for both the Development Committee and prospective members.

D. Broad Principles

1. FaithInvest is built on a multi-faith vision of Life and Earth.
2. At the heart of FaithInvest are faith investors and faith organisations. These will be in partnership with philanthropies and NGOs and an inspiration to investors guided by their own faith.
3. FaithInvest guides investment in line with faith-consistent principles, values and responsibilities. This creates demand for faith-consistent investment initiatives.
4. The faiths also generate projects which need investment. These also need support services to become investable at scale.
5. FaithInvest helps the faiths build bridges and form partnerships with secular agencies and suppliers of secular and religious financial services.
6. FaithInvest aims to assist entire portfolios to be faith-consistent in response to global crises/challenges. That includes any proportion directed specifically toward impact investment.

E. Key Roles: FaithInvest exists to engage the faiths and secular partners to:

1. **Develop** a pipeline of investable projects in line with faith-consistent principles;
2. **Catalyse** faith-based investment partnerships;

3. **Encourage and develop a variety of faith-based guidelines** through regional faith programmes in Asia, Latin America and Africa as well as in Europe and North America.
4. **Create and deliver** faith-consistent opportunities and business services;
5. **Connect** projects with investors at scale;
6. **Undertake applied research**
7. **Focus on faith criteria, indicators and measures;** look for common voices & concerns in this plurality.
8. **Educate and inform through:**
 - a. creating formal and informal curriculum resources;
 - b. raising faith grassroots awareness of FCI principles and potential;
 - c. encouraging faith individuals toward FCI, knowledge sharing;
 - d. providing or partnering with leadership training;
 - e. educating asset managers about engaging with the faiths.
9. **Engage partners:** provide the faith-consistent voice needed for systemic change, for example in partnership with the SDGs.
10. **Inspire: build and tell the story** of FaithInvest and faith-consistent investment

F. Designing FaithInvest

- A. Funding model:
 1. Startup: three to five years of grant funding and up-front investment.
 2. Sustainable. It is a blended model: some membership fees; some fees for relevant and valuable business services (advisory, research, education, other).
- B. Two-tier or hybrid structure with these elements:
 1. Light-touch, not-for-profit flexible association.
 2. Business: for-profit service delivery arm acting consistent with the above. This model has to serve the core Association purposes, not to drive them