



Rosalie Sheehy Cates

I help investors achieve local impact, typically by investing in affordable housing, local businesses, and community real estate projects. I also do research, writing and project management to build the field of community investing.

Helping investors achieve local impact

I help clients and advisors navigate the community investment learning curve to build portfolios that they love. Our work can include:

- ◆ Informed listening and conversation to help you articulate your impact goals and risk parameters, and lay out a viable community investment strategy.
- ◆ Identifying investment opportunities – in many geographies I can find both direct deals and intermediaries that match your strategy. I will present the investment basics (minimum amounts, investment terms, etc.) as well as a frank analysis of the investee’s impact and financial track record.
- ◆ Meetings with potential investees to help you assess the attractiveness of particular deals .
- ◆ Easy-to-use written reports that are concise and understandable.

Field-building research, writing & project management

As a curious, insatiable problem-solver with good people skills, I enjoy working on issues of marketing, product development, and skill-building in the impact investing sector. I like to gather and synthesize complex information to find the underlying patterns and opportunities. I am a good trainer, and I enjoy every form of communicating knowledge.

Some of my work in this area has included report-writing; management of multi-organization collaboratives; and situation analysis for a group of similar investors.

Recent engagements

- ◆ *For a large regional foundation:* Created sample portfolios of debt and equity investments that could fuel business growth and neighborhood revitalization in six states. Interviewed and evaluated impact and financial performance of community loan funds, growth companies, and affordable housing/community development organizations. Provided detailed sample state-by-state investment portfolios.
- ◆ *For a community foundation:* Helped the foundation strategize a new role as a local impact investor in one county. Educated staff on community investing options and impacts, and researched potential investees including local service organizations with facilities projects, housing authority, community loan funds, private affordable housing developers and community action programs. Facilitated meetings with potential investees.