



## RIA and Multifamily Office Services: Overview

Cornerstone Capital works with institutions, individuals, family office, foundations, and trustees. We collaborate with our clients to develop and manage a customized investment strategy aligned to their financial and values-based objectives.



### Partnering for Stewardship and Progress

Sustainable and impact investing is all we do. We have deep experience in both ESG/impact investing and wealth management, and believe sharing our expertise with other advisors can add value to all involved. We support RIAs and multifamily offices with policy development, manager recommendations, education, and ongoing advice. We respect the value of your long-term client relationships, and understand the importance of trust in our collaboration. We are committed to helping you retain and enhance your client relationships.



### Thoroughly Researched Recommendations

Our open-architecture platform and proprietary, institutional-quality due diligence uniquely positions us to help our clients to maximize impact within the context of fiduciary duty. We source investment solutions across all major asset classes, including thematic solutions. In order to be recommended to our clients, a manager must demonstrate to us a clear strategy, an effective and consistent process for implementation and sufficient expertise in the factors that may impact the risk and performance of the strategy, including sustainability. We evaluate manager track records, whether they offer a unique investment approach and how clearly they can articulate the objectives of their strategy.



### Educational Services

Cornerstone brings together the expertise of our investment advisory, research, and impact teams to provide insight on a range of topics and thematic areas. We can create customized educational curriculums focused on building understanding of the sustainable and impact investing space as well as specific investment themes. Cornerstone's professional networks and active participation in field-building initiatives also give us a robust perspective on the diverse and growing investment landscape of sustainable investment.

## RIA and Multifamily Office Services: Detail

Cornerstone takes a flexible approach, customizing our services to the needs of the particular partner to create a mutually beneficial outcome. We can undertake a full subadvisory role, or provide specific services:

Diligence existing managers on your platform using our ESG assessment methodology.	Source managers across asset classes and in consideration of specific impact goals.	Consult with clients who want to explore “impact” but require help getting started.
Provide RFP support to help your firm address impact-related aspects of a potential mandate.	Provide DAF-related allocation advice.	Educate advisors and/or clients on specific impact themes or investment strategies.

### Contact us

To learn more, please contact us. We would be happy to discuss your specific needs and work together on a mutually beneficial solution.

**New York**  
**Erika Karp, Founder & CEO**  
 1180 Avenue of the Americas, 20<sup>th</sup> floor  
 New York, NY 10036  
 +1 212-874-7400  
[erika.karp@cornerstonecapinc.com](mailto:erika.karp@cornerstonecapinc.com)

**Denver**  
**Phil Kirshman, Chief Investment Officer**  
 Alliance Center  
 1536 Wynkoop Street, Suite 521  
 Denver, CO 80202  
 +1 646-650-2234  
[phil.kirshman@cornerstonecapinc.com](mailto:phil.kirshman@cornerstonecapinc.com)

[www.cornerstonecapinc.com](http://www.cornerstonecapinc.com)  
 General inquiries: [info@cornerstonecapinc.com](mailto:info@cornerstonecapinc.com)  
 Find us on Twitter: [@Cornerstone\\_Cap](https://twitter.com/Cornerstone_Cap)

