



Episode 11: Values-Based Investing with Ethic

This month, CAPTRUST Senior Director of Endowments and Foundations Heather Shanahan talks with Anthony Marcozzi, associate director of relationship management at [Ethic](#).

Marcozzi explains Ethic's approach to working with endowments and foundations, highlighting the importance of understanding an organization's mission and values.

He and Shanahan also discuss the challenges and opportunities in the impact investing space, like:

- Emphasizing the importance of working with trusted advisors
- Focusing on education
- Transparency
- Community engagement

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Resources:

Last Episode: [Markets, with CAPTRUST's Andy Marino | Nonprofits](#)

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