

# Mission Control for Impact Deployment



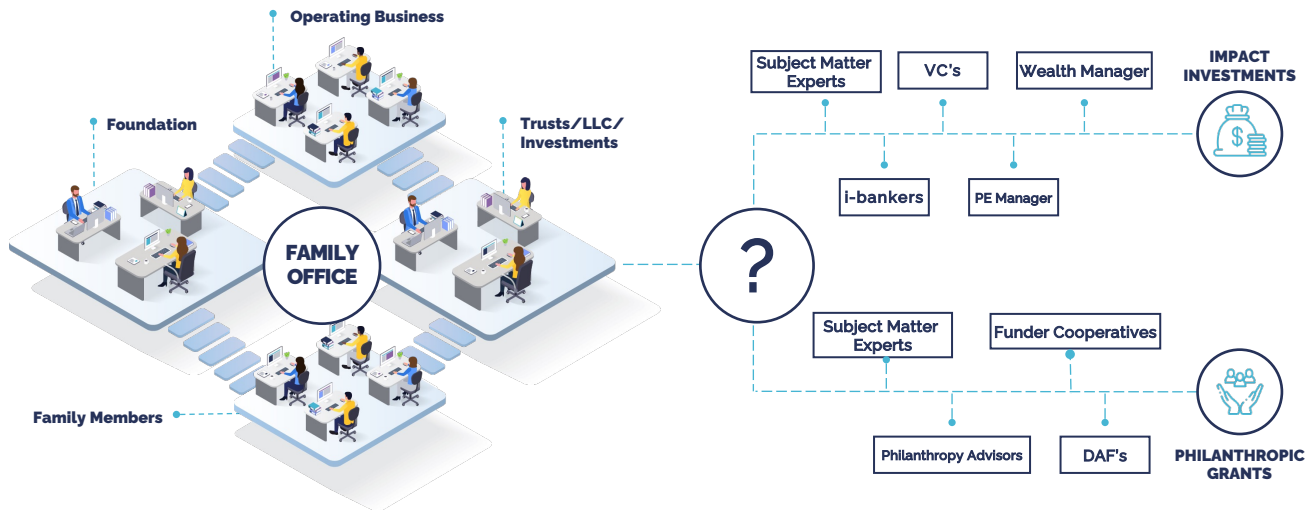
The only family office collaboration platform that facilitates all aspects of grantmaking and impact investing.

## The Problem

Family offices have unique challenges, with complex structures, services, platforms and intermediaries. In-house systems are often non-existent (spreadsheets) or expensive, misaligned with family structure, high-maintenance and inefficient to deploy impact capital.

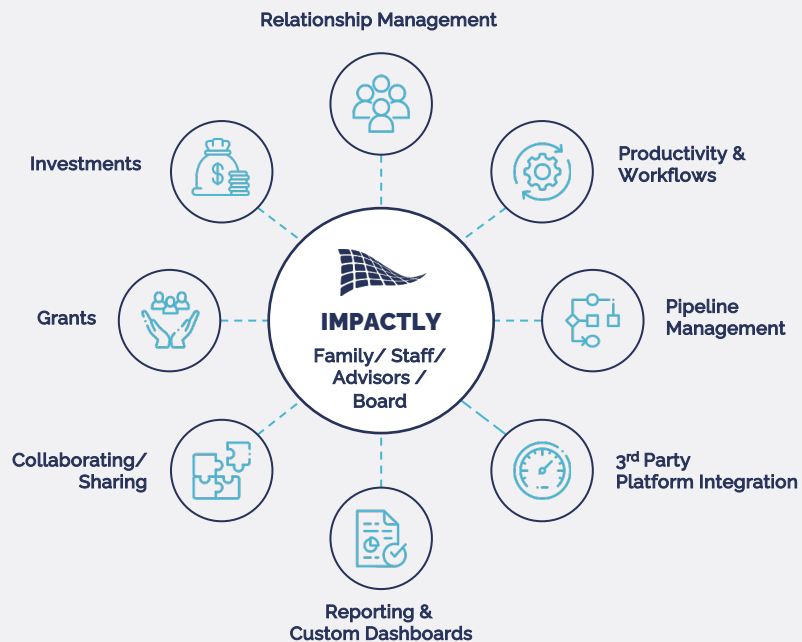


Impactly brings everything together and enables us to focus on deploying impactful capital"  
**Kara Ballester, ED**  
**BQuest Foundation**



## The Solution

The Single 'True Ledger' Productivity Platform for Funders



Save Time, Make More Informed Decisions, Achieve Better Outcomes

## Case Study:



The **Sobrato Org** is a large FO with 4 generations, 17 family members & 40 staff members.

**Problem:** Sobrato had no visibility across entities or family members, making collaboration & reporting practically impossible – with capital not being deployed.

**Solution:** Impactly becomes the single 'source of truth' for family meetings, uncovering multiple allocation problems & facilitating funding collaboration.

**Deploying More Impactful Capital, Faster**

## What Impactly can do for you?

Impactly is a software platform that helps securely consolidate the multiple activities of your family office in one place. This creates efficiencies for the staff, clearer insight for family members across the org, and facilitates better resource deployment and management.

As a fully supported secure platform, Impactly streamlines operations and facilitates unprecedented and discreet collaboration among peers and trusted 3<sup>rd</sup> parties to foster syndication, engagement, and outcomes.

## Core Capabilities

- ✓ **Enhanced Productivity**  
of investment and grant-making workflows.
- ✓ **Collaborate**  
and discreetly share projects, companies, or portfolios with peers, encouraging co-funding and syndication.
- ✓ **Data Analytics & Reporting**  
measuring performance, impact metrics, cash flow projections and adjustments.
- ✓ **Fully Customizable Platform**  
for any level of complexity or use case, with accessibility via any device.
- ✓ **Integration**  
of both manual and automated data feeds.
- ✓ **Tailored Permissions**  
based on specific roles (staff, family members, advisors).

## Value Added Services

Benefunder Provides a Full Spectrum of Deployment Support



### Mandate Services

Bespoke family office and foundation services, including sourcing, diligence, structuring, and transactions across philanthropy and impact investing



### Capital Markets

Investment banking services that expand access to funding vehicles, capital sources, & syndication opportunities

- ✓ **Maximum Security**  
with encrypted, two-stage authentication.
- ✓ **Enterprise-Level Support**  
with white-glove setup, issue escalation, and new feature updates.