

Responsible. Innovative. ESG Real Estate.

Pioneering ESG Real Estate

For more than a decade, we've worked to incorporate an ESG platform into the heart of our real estate products, with the understanding that we must consider the impact on the future when making present-day decisions. People, planet, and profit are values that work in harmony to build a world with a sustainable environment, elevate humankind, and provide complete transparency in operation. The EcoVest ESG platform addresses complex environmental and social issues without forfeiting the importance of financial growth in real estate investments.

ESG Real Estate Aligns with Family Office Core Values

A dramatic shift in investor behavior makes it clear that today's investors, especially among Gen Xers and millennials, want to partner with companies that share values similar to their own. The ESG-based real estate asset class provides the opportunity not only to diversify returns, but also to address many of the core values fundamental to the next generation of investors.

What Qualifies as an ESG Real Estate Investment?

Real estate can have a significant social impact, with ESG values increasingly shaping and influencing real estate valuation. EcoVest has pioneered strategies to develop sustainable real estate investment products beneficial to communities, the environment, and society as a whole. In addition to financial risk/return analysis, we assess the potential of each real estate investment opportunity based on a series of criteria that protect natural resources, support health and well-being, and encompass fair and transparent practices.

EcoVest's ESG real estate criteria include:

- Social benefits to the community
- Reducing carbon footprint
- Preservation of natural resources
- Renewable energy usage
- Strategies to manage climate change
- Wildlife protection

Our track record demonstrates that ESG principals can be combined with innovative design, core values, and profit objectives, while advancing public good.

55%

OF MILLENNIALS*
Factor ESG into
investment decisions

25%

OF GEN XERS*
Factor ESG into
investment decisions

11%

OF BABY BOOMERS*
Factor ESG into
investment decisions

25%

OF FAMILY FOUNDATIONS*
Engage in ESG
(impact) investing

\$68T

OVER 25 YEARS
Largest non-wartime
transfer of wealth

SUSTAINABILITY GOAL

Carbon neutral

SOCIAL GOAL

Addresses 6-million-unit U.S. housing deficit

ENVIRONMENTAL GOAL

Low-impact community design

EcoVest Capital, Inc. • Monarch Tower
3424 Peachtree Road NE, Suite 700 • Atlanta, GA 30326
470.440.3302 • info@ecovest.com

*Emerging Trends in Real Estate® 2020, PwC and the Urban Land Institute
†2019 Global Family Office Report, UBS and Campden Research

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