

GIVING BACK

CHARITABLE INVESTORS

SINCE **WEST COAST ASSET MANAGEMENT** opened its doors in Montecito in 2000, it has garnered attention for its Charitable Giving Program as well as its dedication to green office initiatives. Cofounder Paul Orfalea is known for his altruistic pursuits—particularly >



LEFT TO RIGHT: Senior vice president Andrew Firestone; chief financial and compliance officer Diana Pereira; cofounder and president Lance Helfert; Erika Buse, investor relations; Atticus Lowe, CFA, chief investment officer.

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his devotion to social, environmental, and educational issues, which are woven into the fabric of the company. Through its charitable investments, WCAM has donated more than \$350,000 to non-profits, including such local organizations as Dream Foundation, Child Abuse Listening & Mediation, and Direct Relief International. Recently, the business has taken its philanthropic pursuits a step further with the innovative and emerging industry of impact investing, which cultivates positive social and environmental impacts as well as financial returns.

“Being a young, nimble company, we’ve been able to grow with our clients’ expectations,” says senior vice president Andrew Firestone. “The next step is active contribution—to make an impact and to be innovators and leaders in this area.” WCAM consists of entrepreneurs in the fledgling field of impact investing, which allows investors to stay involved with projects while yielding both financial and social gains. “Over the past few years, organizations have realized—from an investment perspective—that there are different ways to give back,” says chief financial and compliance officer Diana Pereira. “Impact investing focuses on issues from a charitable perspective but can also generate significant levels of return.” Adds Firestone, “We are a for-profit company, but a lot of what we do involves contributing to the community. Aside from just donating money, WCAM lends expertise so investors can better assess where their money is being implemented and how it’s being managed.”

WCAM plans to invest in industries—including affordable housing, charter schools, and environmental programs—that correlate to the community as well as the company’s current investment group. Says Pereira: “There is a way to invest and have it return to the investor while also helping us become more well-rounded and aligned with our values and our clients.” ■