

2021 ANNUAL COMMUNITY REPORT



COMMITTED.

Innovest Portfolio Solutions was built on a mission of stewardship; that is, the careful and responsible management of something entrusted to one's care. We see it as our responsibility to care for our clients, coworkers, and the community around us.

The firm-wide commitment to philanthropy is woven into the fabric of Innovest, and we are honored to be ranked among charitably-focused firms:



Top 25 of Denver Business Journal's 2021 Denver-Area Corporate Philanthropists



GIVING

FULL LIST OF ORGANIZATIONS INNOVEST MADE DONATIONS TO IN 2021:

Alliance for Choice in Education - ACE Scholarships
Anchor Center for Blind Children
AllHealth Network
AlloSource
Alpha Omega Alpha Honor Medical Society
AORN Foundation
Archdiocese of Denver
Arrupe Jesuit High School
Augustine Institute
Bella Health & Wellness
Big Brothers Big Sisters of Colorado
Boulder County Fire Fighters Association
The Buck Institute for Research on Aging
Caruso Family Charities
Catholic Charities
The Catholic Foundation of Northern Colorado
Centennial Institute
Central City Opera House
Chadron State College Foundation
Cherry Creek Schools Foundation
Chesterton Academy of our Lady of Victory
Colorado Christian University
Colorado School of Mines Foundation
Colorado State University Foundation
Colorado UpLift
Community Reach Center Foundation
Crane Trust
Credit Union of Colorado Foundation

Denver Botanic Gardens Endowment, Inc.
Denver Health Foundation
Denver Public Schools Foundation
Denver Regional Council of Governments (DRCOG)
Developmental Pathways
Economic Literacy Colorado
Educating on the Nature and Dignity of Women (ENDOW)
Energy Outreach Colorado
Families of Character
Fellowship of Catholic University Students (FOCUS)
Five Star Education Foundation (Adams 12 Five Star Schools)
Focus on the Family
Food Bank of the Rockies
Geochemical Society, Inc.
Girls Inc. of Metro Denver
Gold Crown Foundation
Habitat for Humanity
Hays Medical Center Foundation
Inner City Health Center
International Association for the Study of Lung Cancer (IASLC)
Jeffco Schools Foundation
Jefferson Center for Mental Health
Junior League of Denver Foundation
The Kempe Foundation
Little Souls of Tanzania
Littleton Public Schools Foundation
Longmont Community Foundation
Mental Health Center of Denver

Mercy Housing
Mullen High School
The Navigators
Navy Seal Foundation
NITA Foundation
North Colorado Medical Center Foundation
Pikes Peak United Way
Project Angel Heart
Project C.U.R.E.
Regis University Foundation
Rocky Mountain Public Media
Rotary Club of Parker Foundation
The Saint Sebastian Project
Seeds of Hope
Society of Economic Geologists
South Dakota Mines Center for Alumni Relations and Advancement
Taylor University Foundation
Temple Emanuel Denver
That Others May Live Foundation
Trinity United Methodist Church
City of Tucson Firefighter's Ball
University of Northern Colorado Foundation
University of Colorado Foundation
Westminster Legacy Foundation
Women First International Fund
YMCA of Metropolitan Denver
Young Life

FOCUSED AREAS:

- ✓ Education
- ✓ Underprivileged
- ✓ Health and Wellness





COMMUNITY INVOLVEMENT

In 2021, Innovest employees volunteered at the following organizations:

- Adopt-A-family
- Arrupe Jesuit High School
- Brothers Redevelopment
- Central City Opera House
- Christ in the City
- Colorado Gives Day
- Denver Rescue Mission
- Denver Santa Claus Workshop
- Food Bank of the Rockies
- Habitat for Humanity
- Holly Heights Nursing Home
- Little Flower Assistance Center
- Marisol Homes
- Navy SEAL Foundation
- Project 600
- Project Angel Heart
- Project CURE



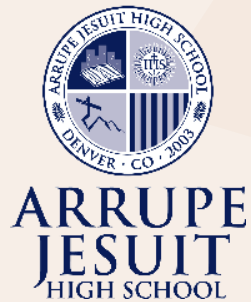
BUILDING COMMUNITY

2021 NONPROFIT OPPORTUNITY SPOTLIGHT

ARRUPE JESUIT HIGH SCHOOL CORPORATE WORK STUDY PROGRAM

Since 2014, Innovest has employed four students from Arrupe through the school’s Corporate Work Study Program (CWSP). This unique school provides a college preparatory education and gives each student four years of work experience by partnering with local businesses. During their time at Arrupe, each student is “employed” by a company and in exchange, the company pays a portion of their tuition.

Arrupe students are from economically disadvantaged families. They are usually the first from their families to not only graduate from high school, but also attend college. Each of the students is assigned a professional mentor at Innovest. CEO Richard Todd also personally established a college scholarship fund for Arrupe students. The CWSP program is very successful.





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2021 NONPROFIT OPPORTUNITY SPOTLIGHT

FOOD BANK OF THE ROCKIES

Food Bank of the Rockies, is a large, centralized resource that acquires and distributes food and necessities. They are the largest hunger-relief organization in the Rocky Mountain region. That makes them uniquely suited to answer the enormous challenge of hunger, which affects 1 out of 8 people in our communities. Since 1978, they have put the power of community to work for our neighbors in need.





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2021 NONPROFIT OPPORTUNITY SPOTLIGHT

BROTHERS REDEVOLPMENT'S PAINT-A-THON

Innovest participated in the Paint-A-Thon through Brothers Redevelopment which is a program that offers income-eligible, disabled, 60+ year-old homeowners the chance to save big and devote their savings to their other important costs, such as medication, groceries and bills, while still maintaining their most important investment—their home. Painting a home exterior can cost upward of \$5,000—a huge expense for any homeowner.



Brothers Redevelopment, Inc.

Housing • Home Modification & Repair • Housing Counseling