

# CapShift Surpasses \$1 Billion Catalyzed for Impact, Strengthening Role as Leader in Institutionalizing Impact Investing

*Firm doubles capital mobilized by clients through its platform in just over a year, accelerating private & philanthropic assets toward scalable impact solutions*

BOSTON, MA, UNITED STATES, June 17, 2025 /EINPresswire.com/ -- [CapShift](https://www.CapShift.com/), the backbone of impact investing solutions across many of the world's largest financial, charitable, and

corporate institutions, today announced it has mobilized \$1 billion to date into impact investments through its platform — doubling its cumulative total in just over a year. This milestone underscores both CapShift's expanding role in scaling impact investing, as well as the growing demand from wealth and philanthropic institutions to leverage capital as a tool for social and environmental progress.



Since its launch in 2018, CapShift has built the infrastructure to help financial advisors, donor-advised fund (DAF) providers, foundations, and family offices deploy private market impact investments at scale. The firm now supports impact investing programs across more than 45 private wealth and charitable institutions, including ten of the top 15 DAF providers.\* Its clients include 1% for the Planet, Abacus Wealth Partners, The Chicago Community Trust, Cisco Foundation, Corient, Fidelity Charitable, Glenmede, Google, Heron Foundation, MS GIFT, Ren and Renaissance Charitable Foundation, Silicon Valley Community Foundation, Vanguard Charitable, and more.

"We started CapShift because we saw firsthand that there were hundreds of billions of dollars in pent up demand for impact investing — but not the necessary infrastructure to unlock it," said Adam Rein, co-founder and CEO of CapShift. "From day one, our early partners like Fidelity Charitable helped us shape a solution that now makes it easy to access over 1,400 impact opportunities and build portfolios tailored to individual clients' goals. Today's milestone underlines that this demand is only growing — clients aren't just asking for impact, they expect it, and they're acting on it."

Founded by MissionPoint Partners, Jacques Perold (former President of Fidelity Research & Management), and the Heron Foundation, CapShift launched with a clear vision: unlock private capital for impact at scale by offering streamlined access to impact investments. The firm began by serving the U.S. charitable sector — a market now projected to manage more than \$2 trillion in DAF and foundation assets alone. Recognizing the same unmet need across the private wealth landscape, CapShift established CapShift Advisors LLC in 2021, an SEC-registered investment advisor providing advisory services to leading financial institutions.

“CapShift has been a critical partner in delivering a scalable, mission-aligned investment experience to our donors,” said Melanie Schnoll Begun, Head of Philanthropy Management and the Family Office Resources Field Engagement team at Morgan Stanley. “It’s platform and expertise make it significantly easier to offer authentic impact opportunities without compromising on rigor or operational efficiency.”\*\*

Reaching this milestone of \$1 billion moved into impact funds and enterprises through CapShift’s platform was fueled in part by rapid growth of the firm’s Research Engine. The proprietary database, a cornerstone of CapShift’s impact investing platform, now features more than 1,400 impact opportunities. The offerings represent more than \$200 billion in curated funds and enterprises, spanning all major private asset classes including private equity, venture capital, private credit, real assets, and recoverable grants.\*\*\* The breadth of the Research Engine’s opportunities offers advisors and institutions a uniquely powerful tool to build customized portfolios with confidence and efficiency.

CapShift’s growth also points to a broader shift in investor expectations: clients increasingly want their portfolios to reflect their values, and institutions that can meet that demand are gaining a competitive edge. The global impact investing market has more than doubled in the past three years, [exceeding \\$1.5 trillion in 2024](#). And client interest continues to deepen: [45% of high-net-worth investors](#) say they own or are interested in making impact investments. With trillions in wealth set to transfer to next-generation investors in the coming decades, CapShift’s platform is helping leading institutions turn demand into action — and impact into measurable outcomes.

“CapShift plays an essential role for us as we increasingly seek like-minded partners for co-investment in solutions to the climate and toxicity crises,” said Ramsay Ravenel, Chief Investment Officer of the Grantham Foundation for the Protection of the Environment, an early CapShift investor. “With our investment in CapShift, we hope to strengthen the entire mission-driven investing ecosystem by making it easier for transformational ideas to find the capital needed to demonstrate their value and scale.”\*\*

CapShift is now investing in its next phase of growth, by expanding its team and enhancing its technology and tools. The firm recently introduced its first AI tool to clients earlier this year and continues to expand the depth and breadth of its Research Engine. As advisory firms, DAF providers, and other financial institutions look to make impact investing a standard offering, CapShift stands ready to support them — and power the future of finance.

#### About CapShift:

Designed to scale, CapShift is the backbone of impact investing solutions across many of the world's largest financial, charitable, and corporate institutions. Our comprehensive platform supports our partners at every step — from client interest to allocation. Rely on our expertise and technology to find opportunities, engage clients, and invest easily. For more information about CapShift and its work, please visit [www.capshift.com](http://www.capshift.com).

\*By assets managed, CapShift internal data.

\*\* Current client of CapShift was solicited for this quote. No compensation was provided for this testimonial.

\*\*\* CapShift internal data.

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