



## Angeles Wealth Management Launches Comprehensive Mission-Related Investing Program

Angeles provides the playbook for families to come together around their values to meet financial, tax, family, & philanthropic goals

**SANTA MONICA, CA - DECEMBER 8, 2022**— [Angeles Wealth Management](#) today announced the launch of the Angeles Wealth Mission-Related Investing program. This new initiative will enable integration of families' investment and philanthropic activities and deliver bespoke solutions that aim to balance long-term capital accumulation with positive impact goals.

Spearheaded by Angeles Wealth Managing Director [Marta Ferro](#), a philanthropic advisor and ESG expert, this initiative strengthens the Angeles approach toward delivering values and mission-aligned portfolios across the public and private markets investment continuum—from fixed income and equity investments to indexing and private equity.

"Helping philanthropic families develop an enduring legacy across generations is an incredibly rewarding endeavor," said [Jonathan Foster](#), **President and CEO of Angeles Wealth**. "Understanding that many inheriting generations, as well as clients across the board, desire and require a focus on impact and mission-aligned investing, Angeles Wealth has taken this mandate to a new level."

The new program comes at a time when a growing number of ultra-high-net-worth families are examining the role of their investments in fostering a meaningful legacy. Combining strategic philanthropy, mission-driven investing, inter-generational wealth planning, tax management and education, Angeles collaborates with philanthropic families to create a mission statement that codifies their values and vision for the future. From there, Angeles Wealth builds, implements and executes a plan and process aligned to a family's unique value system and goals.

"With Marta's guidance, we're looking forward to delivering meaningful solutions that help clients direct capital with maximum impact relative to their values and purpose," added **Foster**.

Ferro lends more than two decades' experience in social impact, philanthropic giving and wealth management to this project. She added: "Affluent families are uniquely positioned to leverage their capital in support of positive societal and environmental outcomes. I'm thrilled to lead this initiative, which will support mission-driven investors' efforts to make a meaningful impact on their communities and society at large."

Ferro earned her MBA from The Anderson School at UCLA and previously worked in the Goldman Sachs investment management division. She served as a member of Goldman Sachs' Diversity Committee and has been involved with many nonprofit organizations in the Los Angeles area. She is currently affiliated with Social Justice Partners, Liberty Hill Foundation, Sidwell Friends School and the Westland School; she has also built an extensive network in the nonprofit sector.

Angeles Wealth Management works with numerous families to coordinate measurable strategic philanthropy integrated with personalized wealth management services. To learn more about Angeles Wealth's mission-related investing approach, please visit [angelesinvestments.com](https://www.angelesinvestments.com)

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[Angeles Investments](#) is a multi-asset investment firm, providing customized investment solutions to institutional clients. The private wealth affiliate, [Angeles Wealth Management](#), provides these same institutional-quality solutions to select private investors and families. The team at AWM works with their clients to understand each investor's unique needs, including generational planning, family dynamics and long-term goals. Angeles Investment Advisors was founded in 2001 and Angeles Wealth founded in 2011, and has locations in Santa Monica, New York City, Chicago and Houston.