



Aspiring Impact Investors Welcome!

**The Revalue Collaborative
Fall Cohort application
period is open**

from September 14-28, 2020

Your Opportunity.

Navigating the intricacies of life is better in good company. This program provides both community and professional support to those seeking to align their financial lives with their moral compass. In these uncertain times, we hope to support our fellow humans by lowering the barriers to becoming an impact investor. To this aim, we have decided to waive our minimum investment management fees and make growth and learning accessible to more people. Accepted applicants will be brought into the practice as a peer group, onboarded at the same time, and given opportunities to connect, learn and get the financial support they need.

Why should I join?

Clients join Revalue because they are committed to saving, investing, giving, and spending in ways that are aligned with their values. We are inviting those who are new in their investing journey all the way up to investors with \$250k in investable assets to join us during this special open application period. We have designed this process to meet you where you are, first time investor or seasoned wealth builder - we welcome you to join our collaborative.

What will I need?

Curiosity and the dedication to learn about being an impact investor. This cohort will greatly benefit investors with assets up to \$250k. Applications must be submitted by September 28th to join. A one time onboarding fee, set by YOU in the price range of \$5 to \$500 will allow this opportunity to be accessible to all. Participants will pay a standard annual investment management fee of 1.25% on their account, this is the same rate all Revalue clients pay. See our [Client Brochure](#) for more details about Revalue.



Here are some details. We hope you will join us!

**Apply at
bit.ly/Fall2020Colab**

What should I know about Revalue?

Revalue is an independent registered investment advisory firm located in Downtown Ypsilanti, Michigan. Founded in 2013, we have been a leader in impact investing and local investing, partnering with investors and institutions to help build a more equitable economy while serving their finance, investment, and educational needs. Revalue is proud to be a Certified B Corporation®. Becoming a Certified B Corporation® means becoming a corporate leader in social and ecological performance, working not just for profit, but for the welfare of our employees, communities, and environment.



Benefits of the Experience.

- Values-driven portfolio management
- Investment Policy Statement creation
- Access to RightCapital for financial planning analysis
- Access to our client community platform for education and connection with other investors
- Peer group calls every other month
- Activities and education sent via email to complement peer group calls
- Education and resources about investing for local impact

Experience schedule.

- Sept 14-28th - Application window
- October - Onboarding process (group welcome call, information gathering, Investment Policy Statement drafting)
- November - Portfolio design and construction
- Revalue Collaboration calls in Dec, Feb, Apr, June, and Sept

Let's get started.

Please complete our short form by visiting bit.ly/Fall2020Colab. Remember the deadline to apply is September 28th. The Revalue team will notify you on Thursday October 1st for next steps.