



## Episode 11: Values-Based Investing with Ethic

This month, CAPTRUST Senior Director of Endowments and Foundations Heather Shanahan talks with Anthony Marcozzi, associate director of relationship management at [Ethic](#).

Marcozzi explains Ethic's approach to working with endowments and foundations, highlighting the importance of understanding an organization's mission and values.

He and Shanahan also discuss the challenges and opportunities in the impact investing space, like:

- Emphasizing the importance of working with trusted advisors
- Focusing on education
- Transparency
- Community engagement

Subscribe to [Mission + Markets](#) for more insights for nonprofits and mission-focused organizations.

### Resources:

Last Episode: [Markets, with CAPTRUST's Andy Marino | Nonprofits](#)

[Ethic](#)

---

### Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax



advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors