



**diverse**  
INVESTING COLLECTIVE

# AMBASSADOR TOOLKIT

**33 BY 33: IT'S TIME**

## OUR NEW TOOLKIT

This toolkit is designed for professionals in the asset management and philanthropy space who believe in the mission of the Diverse Investing Collective: 33% of assets should be managed by gender-diverse and racially-diverse teams by 2033. The Collective staff is small and we rely on a special group of select Ambassadors to help us spread the word and recruit new champions to join the cause.

To help our Ambassadors, we've pulled together a toolkit of strategic materials to share with your colleagues and peers. In this toolkit, you'll find key talking points to use at events, introductory language for email connections, and downloadable materials that you can share digitally or in print. Feel free to use any and all of these materials to spread the word on the Collective's mission.



### TALKING POINTS:

- **Origin:** The Diverse Investing Collective was started by Dr. Ruth Shaber, founder of the Tara Health Foundation, and Patience Marime-Ball, who previously worked at the IFC at the World Bank, after they wrote *The XX Edge*, a book which compiles all the best evidence showing gender-diverse teams outperform.
- **Goal:** They are now starting a movement, via the Diverse Investing Collective, and have a goal to have 33% of AUM managed by gender-diverse and racially-diverse fund teams by 2033.
  - Uniquely, they are focused on portfolio managers, rather than owners.
  - Also uniquely, they are focused on how much AUM is managed by diverse teams, rather than simply how many women or people of color work at a firm.'
- **Coalition of Asset Owners/Allocators:** The Collective believes in a demand-side strategy, and are building a coalition of asset owners and allocators to call on their advisors and fund management teams to bring more diversity onto their teams, arguing the evidence shows homogenous teams underperform and diverse teams outperform.



## TALKING POINTS, CONTINUED:



- **Looking for Leaders:** Specifically, the Collective is looking for pioneering asset owners and allocators who are interested in joining the Collective to do three things: (1) Get transparency into the make-up of the fund teams managing their assets; (2) Call for better - engage with advisors, consultants, and asset managers to call for more women and people of color managing more assets; and (3) Share their story to inspire others and show that diverse teams are a good investment.
- **PR:** The Collective has a PR firm - Rally Point PR - and is dedicated to lifting up the stories of those doing it well.



## EMAIL INTRODUCTION LANGUAGE:

*I wanted to reach out to introduce you to Ruth Shaber, President of the Tara Health Foundation. Ruth recently co-authored a book with Patience Marime-Ball – [The XX Edge](#) – which compiles all the evidence around how adding women to financial decision-making teams increases returns and lowers risk. She is now turning the book into a movement, called the [Diverse Investing Collective](#), with the goal of having 33% of AUM managed by gender-diverse and racially-diverse fund management teams by 2033. The Collective believes who controls capital matters, and are building a coalition of asset owners and allocators to call for more diversity in the fund teams managing their assets, both because it's the right thing to do and because the evidence shows diverse teams make better decisions and drive outperformance (socially and financially).*

*Specifically, they are inviting a select group of asset owners and allocators to join their Innovative Investor Circles, which are small groups of 8 to 10 investors who are willing to first examine the make-up of their fund management teams and then call for more women and people of color to be added to the teams managing their funds.*

*Given your work in this space I thought it would be great to connect you. Attached is the latest deck and three-pager on the Innovative Investor Circles.*



# ADDITIONAL MATERIALS TO SHARE

[DIVERSE INVESTING COLLECTIVE DECK](#)

[DIVERSE INVESTING COLLECTIVE TWO-PAGER](#)

[INNOVATIVE INVESTOR CIRCLE THREE-PAGER](#)

[POSTCARD](#)



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TO LEARN MORE AND JOIN THE MOVEMENT.