



North Berkeley
WEALTH MANAGEMENT

Community Engagement Report

2019



2019 Giving Overview

North Berkeley Wealth Management gives to create a positive impact, for us as individuals, for the firm as a whole and, most importantly, for our community. Although giving has many intangible results, we try to inspire continued participation by outlining the impact of our giving over the course of a year so that we can strive to do even better the next year.



Areas of Focus

Education/Literacy	Social Justice
Healthy Communities	Environment

Community Partners

- Berkeley Food Network
- Berkeley Public Library Foundation
- Berkeley High School Development Group
- Ecology Center
- Covenant House California
- YES! - Nature to Neighborhoods

Volunteering Highlights

- Albany School District
- Bay Area Book Festival
- Berkeley Food Network
- Changemakers Project
- Rosa Parks School
- Rotary Club

Number of organizations donated to in 2019

21

Paid service days provided to each team member per year

5

Sponsorship and Donation Highlights

ABGSL	Jelly's Place	SF Girls Chorus
Aids Life Cycle	First Graduate	Stake PBC
Albany Girl Scouts Pack 3	The Nicholas Colby Fund	Step One School
Bay Area Book Festival	Ocean Conservancy	Uncharted Festival
Berkeley Athletic Fund	SchoolCare	Yes

2019 Engagement Stories

Promoting Alternative Transportation

A well-stocked energizer station for **Bike to Work Day** hosted by North Berkeley serving over 75 riders.



Uplifting the Arts

In 2019 we hosted four **art exhibits**, participated in the **ArtWalk** and sponsored a film screening for **A Place to Breathe**.



Getting Food to People Who Need It

Our time, leadership, and creativity helped **Berkeley Food Network** launch their new distribution hub.



Keeping Dialogue Alive and Well

North Berkeley sponsored and helped produce the reboot of the engaging **Uncharted Ideas Festival**.



Getting Kids and Families into Nature

Our community partners at Yes created a magical evening of food, stories and music at **Rock the Redwoods** to support their mission.



Supporting Education

The **Berkeley High School Development Group** honored North Berkeley for our continuing financial support of the high school.



Community Partners



Yes! Nature to Neighborhoods

Since 1999, YES has brought nearly 5,000 youth and an additional 1,000 families from low-income Richmond neighborhoods to summer and family camps located in pristine redwood settings across Northern California.



Berkeley Food Network

Their mission is to provide an innovative, community-centered network of food sourcing and distribution to alleviate the problems of hunger and poor nutrition in Berkeley.



The Ecology Center

Their mission is to inspire and build a sustainable, healthy, and just future for the East Bay and beyond by transforming the ideals of sustainability into everyday practice.



Berkeley Public Library Foundation

Libraries connect us, building our community, expanding our world, and changing lives. Through fundraising and advocacy, the BPLF amplifies public investment in the Berkeley Public Library to make an already great library extraordinary.



Berkeley High School Development Group

Berkeley High School Development Group supports and strengthens the educational experience of all students at Berkeley High School.



YEAH! Youth Engagement Advocacy Housing a program of Covenant House California

YEAH supports young adults (ages 18-25) in Berkeley who are homeless by providing basic necessities, offer case management, establish linkages to education, employment and housing.

Sponsorships

Our sponsorships provide substantive financial support for non-profit organizations doing exceptional work to make our communities healthy and prosperous. Sponsorships create avenues for our firm to promote organizations while simultaneously building recognition of our firm in the community. We also seek opportunities to make a long-lasting impact by partnering with fundraising efforts on an on-going basis.



Clip from A Place to Breathe a film by Michelle Steinberg

Impact and Visibility

North Berkeley supports events and fundraisers in our community. By directly funding causes we believe in, we align our firm's values with the broader community.

Guidelines

Sponsorships are determined by the firm's leadership team and reviewed on a regular basis throughout the year. We welcome suggestions for possible sponsorship opportunities. Sponsorships will focus on non-profit 501(c)(3) organizations that benefit the well-being of our local communities.

Community Building

A significant component of a sponsorship is the community building provided by integrating our firm into the community, interacting with local change-makers, and building stronger networks.

Firm Donations

North Berkeley Wealth Management believes that the continued support of valued organizations helps our community grow stronger together. Our advisors and leadership team initiate giving throughout the year focusing on organizations that are important to our firm, our clients, and our network of professionals.

Sustained Support and New Opportunities

Part of the giving program is to establish sustained support of organizations. We also seek out new donation opportunities and encourage team members and clients to suggest organizations that meet our giving guidelines and areas of interest.

Employee Donations

We encourage our team to be engaged community members. We provide \$250 a year per employee for charitable donations in their name. The employee donation program is set up to deepen the impact of our donations and to broaden the scope of our giving program by opening it up to additional organizations in our community.

Giving Promotes Well-being

Giving helps our communities by supporting ideas and actions that are otherwise under-served by traditional forms of business and government. Giving is also beneficial for the giver, leading to increased levels of happiness and well-being that in return impacts the well-being of those around them.

Community Involvement

North Berkeley Wealth Management is an active member of the community and uses its time and expertise to support local organizations so that they can better achieve their missions and have a deeper impact in the community. We provide organized volunteer opportunities for our team and encourage volunteering by providing 40 hours a year of paid service time for each team member. Our leadership team is actively involved in providing their expertise and counsel to our community partners and other organizations.



Bike to Work Day Preparation

Paid Service Time

North Berkeley Wealth Management provides five paid service days a year for each member of its team.

Expertise in Action

We are experts in our fields of investment management and financial planning. Nonprofit organizations often lack access to this expertise and our leadership team seeks opportunities to provide guidance through active participation on boards and committees.

Working as a Whole

The power of many, working together is mighty. We encourage our team members to spend time in their communities, engaged in service activities that strengthen their connection to those around them. We also provide opportunities for the firm to work as a whole on specific issues, leveraging our collective strength and reinforcing the bonds we share as a team.

The North Berkeley Team



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Brian Kozel, CFP®
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2019



North Berkeley
WEALTH MANAGEMENT

Invest in Living. Invest in Community.

More Information

northberkeleywealth.com

Questions & Comments

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Photos courtesy of

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