



## SOCIAL ENTERPRISE AND IMPACT INVESTING

CLE  
ACCREDITED  
UP TO 10  
HOURS

Join the TrustLaw team and social innovation experts for practical legal training on social enterprise and impact investing in **San Francisco** on **13 September 2016**. The course will explore key legal issues and trends in the burgeoning social innovation space and provide lawyers and professionals in the sector with the skills they need to advise key stakeholders. Through a mixture of lectures, panel discussions and interactive workshops, participants will gain an in-depth understanding of critical legal matters facing the sector.

### DATE

**13 September** 2016  
**9:00 – 18:00** (training)  
**18:00 – 20:00** (cocktail reception)

### VENUE

Morrison & Foerster LLP,  
425 Market Street Building,  
San Francisco, CA 94105

### PRICING

The full day course will cost \$350. NGOs and social enterprises are entitled to a course discount.

The cost of the course goes to support the work of the Thomson Reuters Foundation's global pro bono service, TrustLaw, which connects the world's leading legal teams to provide free legal assistance to NGOs and social enterprises working for social and environmental change.

### CLE

This course has been approved for up to 8 credits in California and 10 credits in New York and New Jersey. Credits issued will be based upon verified attendance and applicable rules.

### REGISTRATION

Space is strictly limited. Secure your spot at: [trustlawtraining.trust.org](http://trustlawtraining.trust.org)

For more information and to sign up for training updates please contact [carolina.h.schmitz@tr.com](mailto:carolina.h.schmitz@tr.com)

## AGENDA

### PART I - SOCIAL ENTERPRISE

- **Social Enterprise 101: The Big Picture**

Market overview of the social enterprise sector in the US, including definitions of social enterprise, history, and key debates.

- **Lecture and Workshop: Structuring Social Enterprises**

Understand and practice advising clients on the different structures available to social enterprises and on how to lock in social mission.

- **Through the Eyes of a Social Entrepreneur**

Overview of the key legal challenges faced by new social businesses, including shareholder agreements, intellectual property, privacy policies and employee issues and hear from entrepreneurs about how they dealt with these issues.

\* Agenda is subject to change

### PART II – IMPACT INVESTING

- **Introduction to Social Investment**

Market overview of impact investing in the US, covering key players, timeline, history and the future of the sector.

- **Social Enterprise Funding Models**

A broad look at the funding models available to social enterprises in the US, including social impact bonds and an in-depth analysis of law and regulation relating to crowdfunding.

- **Panel and Workshop: Impact Investment Funds**

Key fund managers and financial intermediaries analyze the types of legal structures used for social investment funds and discuss gaps in the market.

## COCKTAIL RECEPTION & NETWORKING

### Global Developments in Social Enterprise and Impact Investing

A cocktail reception with a lively discussion of experts that will provide insight into the different approaches taken to support social enterprise and impact investing around the world.

### WHY YOU SHOULD ATTEND

- Gain a “big picture” market overview of the social enterprise space in the US and beyond
- Get an in-depth understanding of social enterprise and social finance models
- Learn more about the different approaches taken to advance social entrepreneurship globally
- Master the complex web of legal, commercial and social perspectives in impact investing
- Network with key players in the social innovation space

### WHO SHOULD ATTEND

Lawyers • In-house counsel • Social entrepreneurs • Non-profit executives • Impact investors • Academics • Professional service providers and consultants • Financial Intermediaries • Investment Advisors • Other legal and business professionals in government and the social innovation space