Client Focus

We start by asking the right questions.

We begin our process with two critical conversations. Our first meeting will determine if we're a fit relationally: do we enjoy working together. After all, we are embarking on a very long relationship together. Our second meeting will give us a picture of your investing experience, needs, priorities, and values. Only after we have enough information to create a plan specific for you will we propose a course of action.

From these initial conversations, we work diligently to align your values and risk tolerance to create an investment proposal that uniquely reflects your objectives and aspirations. We use impact investing strategies to align your financial goals with your values. We communicate with you to adapt to your changing financial needs and the changing world around us. When working hand in hand to secure each client's financial future, we take great pride in developing deep and long-term relationships along the way.

Services We Offer Include

- Education Funding
- Family Meetings
- Holistic Wealth Planning
- Insurance and Annuity Products*
- Investment Advice
- Liability Management**
- Retirement Planning
- Risk Management
- Shareholder Activism
- Stock Screening
- Wealth Transfer

* Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

** Access to lending products and services through Wells Fargo affiliates.

Impact Capital Strategies Values

We are committed to our clients and to our community.

At Impact Capital Strategies, we will:

- Act as your advisor, putting your interests first.
- Draw upon our firm's myriad experts to help meet all of your wealth management needs.
- Explain the potential benefits and risks of proposed strategies.
- Meet with you to review your investment plan and provide you with consistent communications.
- Perform all requested services promptly.
- Provide guidance that is unbiased, objective, and transparent.
- Strive to acquire a complete understanding of your goals, risk tolerance, and investing time frame.

Impact Capital Strategies supports charities where we work and live that reflect the concerns of our clients, including:

- Anti-racism
- Community economic development
- Education
- Ending homelessness
- Environmental sustainability
- LGBTQ equality
- Low-income housing
- Peace
- Sustaining small, local farms
- Women's rights
- Youth development

We specialize in investment strategies that allow our clients to make a difference in the world while investing in their financial future.

Our Team

Our dynamic is one not traditionally found in financial advisory practices. There is no competition among our team members — only collaboration. We pride ourselves on using a synergistic approach to asset management that capitalizes on each of our strengths. At the heart of Impact Capital Strategies are decades-spanning friendships, a mutual respect and appreciation for helping and serving others, and a shared commitment to making a positive impact on the world and future.

JON ELLENBOGEN,

Managing Partner

Jon became a financial advisor in 1999 after working as an environmentalist for over a decade. His experiences in working to preserve our natural world inform his investing strategy every day. Jon works with clients who have a desire to use their power as shareholders to enact change. Jon finds his greatest happiness with his family, in nature, and listening to music.

STEVE BADT,

Senior Operations Manager

Steve has more than 20 years in non-profit management and project operations experience. His deep commitment to honesty and respect ensure any needs our clients have are met with understanding, precision, and promptness. Steve and his family live in Takoma Park, Maryland.

ASHLEY LAZAREWICZ, CFP®

Managing Partner

Ashley brings 10 years of experience in financial services to our team. She serves as a CERTIFIED FINANCIAL PLANNER™ professional where she helps her clients through comprehensive retirement, educational, and investment planning. Ashley lives in Ellicott City, Maryland with her husband and two daughters.

PAMELA ZEGER,

Branch Administrator

Pamela has over ten years of experience in teaching, marketing, and non-profit development. Her previous work experience, commitment to helping others, and passion for social justice make her a great addition to our team. Pamela lives in Ellicott City, Maryland with her husband and their two sons.

Our relationship with Wells Fargo Advisors Financial Network

Our practice is affiliated with Wells Fargo Advisors Financial Network (WFAFN), the independent investment arm within Wells Fargo & Company. Through WFAFN, we enjoy access to the products, services, and resources of one of the nation's largest financial institutions. We share with WFAFN a commitment to exceptional service based on trust and knowledge and a culture that puts clients' needs above all else.

WASHINGTON, DC
1426 21st Street NW, Suite 5
Washington, DC 20036

202-844-3552
Fax: 202-588-5805
ImpactCapitalStrategies.net

MARRIOTTSVILLE, MD
2205 Warwick Way, Suite 210,
Marriottsville, MD 21104