



RETURN ON GOOD

Empowering Impact Investment & Philanthropy with Strategic Impact and Visionary Partnerships

In the dynamic world of philanthropy and impact investing, few firms stand out for their dedication to creating a meaningful impact and fostering positive change. Return on Good, a visionary consulting firm co-founded by husband-and-wife duo, Jay Kelly and Ann Oleson, emerges as a beacon of hope, guiding philanthropists, nonprofits, and impact investors on a transformative journey. Impact Wealth spoke with Jay and Ann to explore their remarkable mission, success stories, and their strategic approach to cultivating a brighter future for generations to come.

By Hillary Latos

The Converge Legacy and Return on Good's Genesis

Before the inception of Return on Good, Jay and Ann's entrepreneurial spirit flourished through Converge, a highly successful digital marketing agency focused on higher education. For nearly a decade, they collaborated with renowned institutions, like the Wharton School, leveraging digital platforms to connect students with tailored graduate programs. The agency's tremendous growth, culminating in an Inc 500 listing, paved the way for a fortuitous venture capital offer and a successful exit sale.

Inspired by Ann's family's commitment to philanthropy and experience with her own family office, Jay and Ann recognized an untapped market for impact investment & philanthropy that transcends traditional practices. Their aspiration was to empower those focused on impact & philanthropists to create immediate, transformative change

through US donor-advised funds, flexible investments, and foundations. Thus, Return on Good was born with a singular mission: to be the premier strategic partner for those who wish to return good to the world and leave behind a legacy of impact through philanthropic gifts or investments in ESG.

Return on Good's three focus areas are:

1. Strategic Philanthropic Planning- helping Family Offices align their vision and values and philanthropic dollars to return the most good.
2. Impact Investing- helping for-profit businesses focused on the social good to align with investors, raise funds and build their marketing infrastructure.
3. Non-Profits- helping non-profit organizations to develop marketing and fundraising strategy and structure to raise donated dollars.

Empowering Strategic Philanthropic Planning

At the heart of Return on Good's mission lies strategic philanthropic planning—a key pillar that allows clients to align their values with a comprehensive, long-term approach to giving. Drawing from Ann's personal experience of aligning her family's philanthropic efforts, Return on Good guides clients in fostering deep connections among family members and stakeholders. By revealing core values and aspirations, they create a foundation for lasting impact across generations.

Furthermore, Return on Good offers bespoke guidance to family offices after significant liquidity events or when seeking to make targeted impact in specific areas. This personalized approach allows clients to navigate the complexities of strategic giving with a clear vision and a deep sense of purpose.

The Confluence of Impact Investment and Nonprofits

As the philanthropic landscape evolves, Return on Good recognizes the seamless blending of impact investment and nonprofits—a trend that is gaining momentum. By connecting with innovative organizations including medical technology ventures, innovative apps including group therapeutics and mental health, cyber security & risk assessment innovation, and unique tech funds Return on Good helps clients discover opportunities to return good to the world in impactful ways with a significant return on their investment financially and socially.

Through strategic partnerships with a deep network of personal connections along with deep relationships in the family office space, Return on Good ensures clients are equipped to make a lasting difference. Their expertise as seasoned relationship builders, business partners, and digital sales and marketing executives enable them to define and bring brands to life, attracting the right investors and guiding clients through successful investments and fundraising campaigns.

Success Stories that Transform Lives

Witnessing the transformative impact of Return on Good's endeavors is a testament to their mission's success and the majority of their impact investments are in ESG focused on technology and apps. ROG is selective in who they work with so to ensure their values and expertise are a match. By tapping into their marketing savvy, they have created marketing strategies to attract investors for innovative medical technology companies such as, Lumicell, which detects residual cancer cells that were left behind after surgery and WellnessWits, a group therapeutics app offering whole-person solutions for chronic disease care and prevention which can transform lives and create a lasting ripple effect. A new London based client Mettle brings to the table a one-of-a-kind Mental Health App for men co-founded by Bear Grylls and endorsed by Dr. Alex George. Return on Good's portfolio of Impact Investment opportunities is uniquely curated to only companies that the partners would personally invest in. This is unique in that the firm is focused on tremendous success for every



partner that they suggest to the marketplace as an impact investment opportunity.

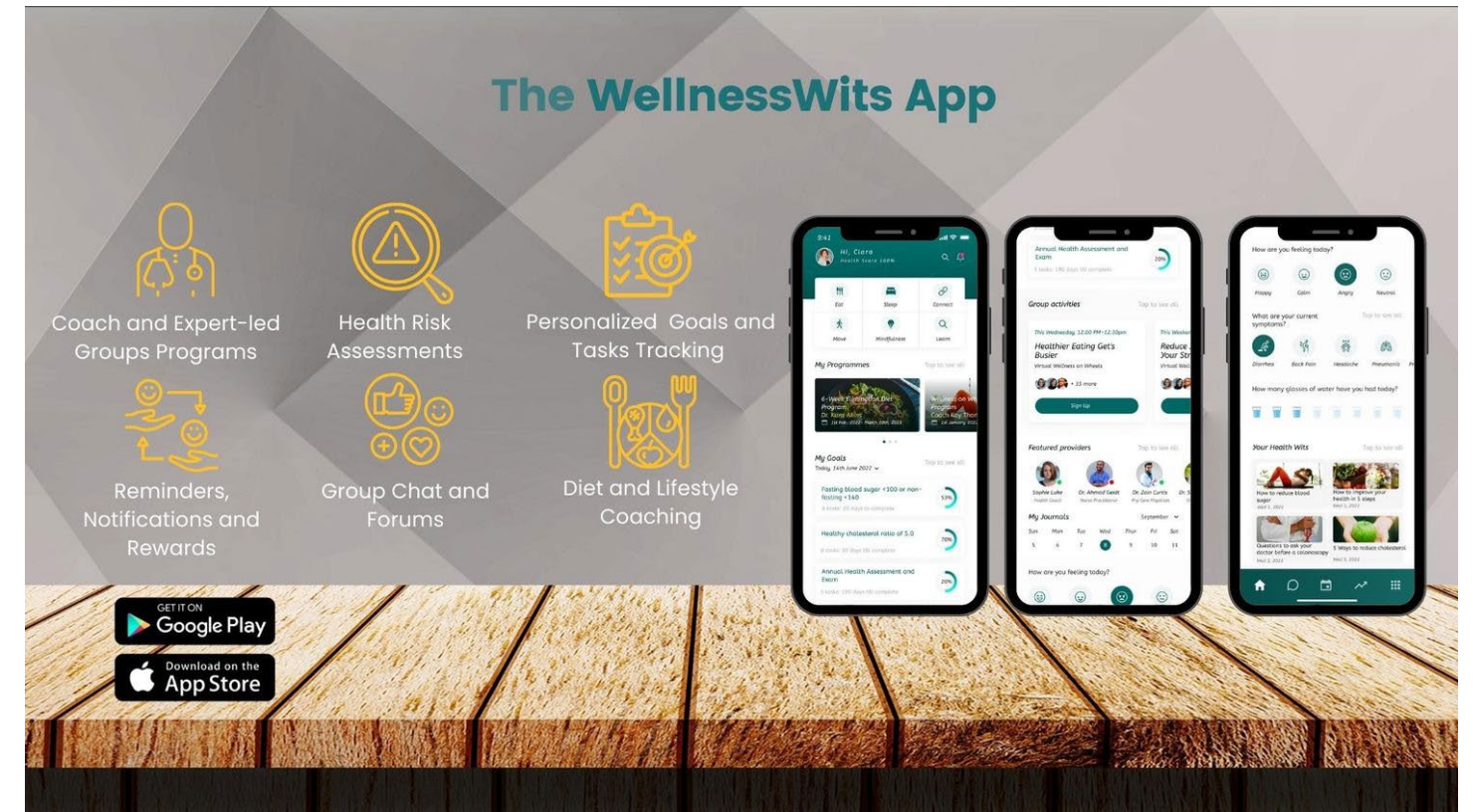
The ROI for every client is uniquely tailored to their goals, whether it's raising millions for a new building, a tech platform, the opportunity to scale globally or securing essential capital for future ventures. Return on Good's unwavering commitment to achieving client intentions reflects their ability to craft solutions that change the world.

Charting a Visionary Path Ahead

Return on Good's future holds a kaleidoscope of inspiring possibilities. Their goal is to become the go-to resource for all things impact investment, aligning investment portfolios with charitable giving, and guiding individuals and organizations towards the path of profound change. From attending influential conferences, such as 'The Future

of Everything' and London Family Footprints Office Events, Return on Good continues to expand its horizons and build a network of trailblazers committed to making a difference.

The core of their business is driven by intentional scale. Return on Good partner, Jay has curated The Wisdom Council which consists of an extensive network of experts in the market who have deep experience in a variety of verticals. This includes a gentleman who specializes in social good and impact projects, primarily with water sources. And another member is a science and philanthropy advisor who worked at the Gates Foundation, a CFO from a top family office, and other deep talent sources who provide perspective to projects. Through this network they can support and deliver on those projects and return good to the world in meaningful ways that are measurable and impactful.



A World of Curated Impact Philanthropy Awaits

As the world witnesses the birth of a new era in philanthropy and impact investment, Return on Good leads the way with a visionary approach and strategic partnerships. Return on Good's unique advantage comes from their incredible network across industries and countries, their deep relationships in the family office space, digital marketing prowess, and significant partnerships and connections with social good companies and non-profits so that they can curate a unique strategy for their partners that provides the most impact in realization to their clients impact investment projects and philanthropic goals. With an unwavering commitment to changing lives and fostering positive change, Return on Good embodies the true essence of curated impact investment and strategy philanthropy—the journey towards a brighter and better world for all.

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