

EmpowerEquity Portfolio Initiative

PORTFOLIO & WEALTH

Fiscal Sponsorship. Wealth Portfolios. Generational Legacy.

DIVISION: EXECUTIVE DIVISION

PROGRAM OVERVIEW

The EmpowerEquity Portfolio Initiative is EH Capital Group's flagship program, embedded across all 15 divisions. It combines financial consulting, capital access, workforce development, and philanthropic infrastructure to build sustainable, generational wealth for underserved communities and fiscal sponsor clients nationwide. This initiative serves as the connective framework unifying all of EH Capital's programs, services, and strategic goals under a single, mission-driven umbrella.

KEY METRICS

750+ Fiscal Sponsor Clients	\$431 Million REIT Income Managed
\$2.2 Billion Corporate Bond Program	15 National Regional Hubs

PROGRAM HIGHLIGHTS

- Serves 750+ fiscal sponsor clients with custom portfolio strategies
- Manages \$431 Million in REIT investment income across referral portfolios
- Anchors the \$2.2 Billion 501(c)(3) Corporate Bond Program
- Connects clients to 15 regional hubs for localized wealth-building support
- Integrates AI-driven tools for real-time portfolio optimization
- Supports estate planning, legacy trusts, and donor-advised fund management

WHO THIS PROGRAM SERVES

Designed for fiscal sponsors, estate clients, minority-owned businesses, and community organizations seeking comprehensive wealth management and philanthropic infrastructure support.

STRATEGIC OUTCOMES & GOALS

- Scale to 15,000+ referral clients by FY 2026
- Achieve \$2.2 Billion in 501(c)(3) Corporate Bond Program milestones
- Expand REIT portfolio to include international ESG-aligned vehicles
- Establish EmpowerEquity as a nationally recognized wealth framework