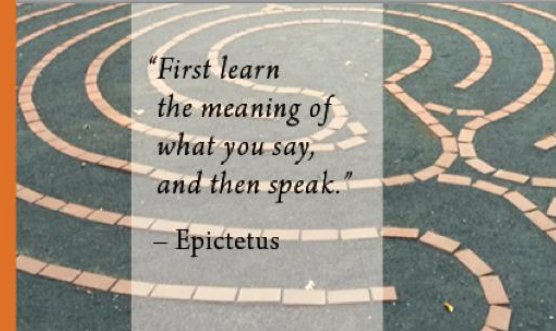


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Robasciotti & Philipson

Mission, Vision, Values

Our Mission

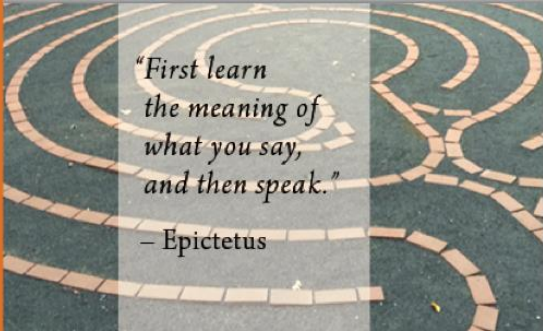
At Robasciotti & Philipson, we bring people together and leverage the power of money to create social justice. Experts at translating deep listening into financial strategies, we structure money to generate individual and collective good.

➔ How we do it:

We cultivate ongoing, transparent dialogue to clarify what matters most and define desired impact. We create spaces where people reimagine money as a force for good in the world, ensuring the voices of historically marginalized groups are heard. By proactively including women, people of color, and the LGBTQ+ community in the conversation, we infuse the financial world with a fresh perspective.

Our Vision

Wealth is transformed into a tool that creates social change and supports the wellbeing of all people and the planet. Our community-based, bottom-up approach revolutionizes how social screens are created and work for the greater good.



"First learn
the meaning of
what you say,
and then speak."

– Epictetus

Our Values

We're financial **experts** who build **community**, take **bold action** for **social justice**, and use money to create **wellbeing** for people and the planet.

- **Expertise:** Masters in navigating the cumbersome financial system, our approach is evidence-based and scientific. We create simple solutions to complex problems.
- **Wellbeing:** We cultivate physical, social, and environmental wellbeing for people and the planet. Our work is values-aligned, holistic, and sustainable.
- **Social Justice:** We continually renew our commitment to social justice and keep it alive in all that we do -- from the way we invest to the people we hire.
- **Community:** We develop community, listen deeply, and pool our collective assets to be a force for positive change in the world.
- **Bold Action:** We deliberate, build bridges, and act decisively. We say what we mean and do as we say.

Our Slogan: *Money Talks. Let's Change the Conversation.*