



548 Market Street, Suite 60335  
San Francisco, CA 94104  
(415) 986-5500  
[www.adasina.com](http://www.adasina.com)

RACHEL J. ROBASCIOTTI

### Item 1 - Cover Page

This brochure supplement provides information about Rachel J. Robasciotti that supplements the Robasciotti and Associates, Inc. dba Adasina Social Capital brochure. You should have received a copy of that brochure. Please contact Chief Compliance Officer, Maya Philipson if you did not receive the brochure or if you have any questions about the contents of this supplement. Additional information about Rachel J. Robasciotti is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 – Educational Background and Business Experience

### **Rachel Joyce Robasciotti**

Year Born: 1979

#### **Educational Background**

Bachelor of Arts, Political Economy – University of California, Berkeley (2001)

#### **Business Background (Preceding 5 Years)**

July 2020 - Present: Founder & Chief Executive Officer, Adasina Social Capital

January 2021 - February 2022: Director Advocacy & Engagement, Abacus Wealth Partners

July 2004 – June 2020: Founder & Chief Executive Officer, Robasciotti & Philipson

#### **Professional Qualifications**

Series 7, General Securities Representative Examination (2002)

Series 66, Uniform Combined State Law Examination (2002)

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Rachel J. Robasciotti.

## Item 4 – Other Business Activities

If a conflict of interest arises, Adasina Social Capital's Code of Ethics ensures the best interests of the client will prevail.

#### **Abacus Wealth Partners, LLC**

- Management Consultant. Abacus is a financial planning and investment management firm. Rachel J. Robasciotti receives compensation as an independent contractor. She does not provide any advisory services in this role, and is not client facing.

#### **Morningstar, Inc.**

- Guest Columnist. Morningstar, Inc. is an investment research firm that compiles and analyzes fund, stock, and general market data. Rachel J. Robasciotti receives compensation as an independent contractor.

#### **Native Women Lead**

- Consultant. Native Women Lead plans to revolutionize systems and inspire innovation by investing in Native Women in business, by co-creating with and convening community to build coalition while honoring culture, creativity, and connections. Rachel J. Robasciotti receives compensation as an independent contractor to the organization and its Matriarch Funds.

#### **One Fair Wage**

- Board Member. One Fair Wage is a national coalition, campaign and organization seeking to end all subminimum wages in the United States and increase the sustainability of wages and working conditions in the service sector. Rachel J. Robasciotti receives compensation as a board member.

#### **Tara Health Foundation**

- Board Member. Tara Health Foundation, a foundation that aims to improve the health and well-being of women and girls in the U.S. through the creative use of philanthropic capital. Rachel J. Robasciotti receives compensation as a board member.

#### **Just Economy Institute**



- Advisor. The Just Economy Institute educates, supports and connects financial activists who are shifting the flow of capital and power to solve social and environmental problems. Rachel J. Robasciotti receives compensation as an Advisor.

### Item 5 – Additional Compensation

Rachel J. Robasciotti does not receive commissions or performance based fees, or any compensation other than regular salary, bonuses, and shareholder draws from Adasina Social Capital.

### Item 6 – Supervision

Adasina Social Capital has appointed a Chief Compliance Office, who reviews and monitors employee activity with respect to applicable rules and regulations. In addition, Adasina Social Capital has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Maya Philipson at the address or telephone number on the cover page of this document.



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MAYA PHILIPSON

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## Item 2 – Educational Background and Business Experience

### **Maya Jean Philipson**

Year Born: 1981

#### **Educational Background**

Bachelor of Arts, Cultural and Interdisciplinary Studies – Antioch College (2003)

#### **Business Background (Preceding 5 Years)**

July 2020 - Present: Chief Operating Officer, Adasina Social Capital

January 2021 - February 2022: Strategic Advisor, Abacus Wealth Partners

January 2020 – June 2020: Principal & Chief Operating Officer, Robasciotti & Philipson

April 2006 – December, 2019: Principal & Wealth Manager, Robasciotti & Philipson

#### **Professional Qualifications**

Series 7, General Securities Representative Examination (2005)

Series 66, Uniform Combined State Law Examination (2005)

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Maya Philipson.

## Item 4 – Other Business Activities

If a conflict of interest arises, Adasina Social Capital's Code of Ethics ensures the best interests of the client will prevail.

Abacus Wealth Partners, LLC

- Management Consultant. Abacus is a financial planning and investment management firm. Maya Philipson receives compensation as an independent contractor. She does not provide any advisory services in this role, and is not client facing.

Philipson Business Properties LP, (Ultra- Goop, Inc.)

- Board Chair. Philipson Business Properties is a privately held real estate partnership. Maya Philipson receives compensation for her services.

## Item 5 – Additional Compensation

Maya Philipson does not receive commissions or performance based fees. In addition to her regular salary, bonuses, and shareholder draws from Adasina Social Capital.

## Item 6 – Supervision

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AFSANA JAHAN

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## Item 2 – Educational Background and Business Experience

### **Afsana Jahan**

Year Born: 1988

### **Educational Background**

Master of Business Administration (MBA) – Brandeis University, Waltham MA (2017)

Bachelor of Business Administration (BBA) – North South University, Dhaka Bangladesh (2010)

### **Business Background (Preceding 5 Years)**

January 2022 - Present: Business Development Director, Adasina Social Capital

March 2019 - November 2021: Advisor & Investment Analyst, Balanced Rock Investment Advisors

February 2017 - February 2019: Senior Analyst, Boston Impact Initiative Fund

August 2015 - December 2016: Full-time MBA student at The Heller School for Social Policy and Management of Brandeis University, Waltham, MA.

June 2015 - October 2015: Fundraiser, Donorworx Inc.

### **Professional Qualifications**

Series 65, Uniform Investment Adviser Law Examination (2019)

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Afsana Jahan.

## Item 4 – Other Business Activities

Other than for Adasina Social Capital, Afsana Jahan receives no investment-related compensation nor is she actively engaged in any other business or occupation for compensation that provides a substantial source of income.

## Item 5 – Additional Compensation

Afsana Jahan does not receive commissions, performance based fees, or any compensation other than regular salary and bonuses from Adasina Social Capital.

## Item 6 – Supervision

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RENEE MORGAN

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## Item 2 – Educational Background and Business Experience

### **Renee Dubois Morgan**

Year Born: 1967

#### **Educational Background**

Master of Arts, Counseling – Leslie College (1997)

Bachelor of Arts, Political Science – San Jose University (1991)

#### **Business Background (Preceding 5 Years)**

July, 2020 - Present: Social Justice Strategist, Adasina Social Capital

January, 2020 – June, 2020: Social Justice Strategist, Robasciotti & Philipson

January, 2019 – January, 2020: Impact Director, Impact Investors, Inc.

December, 2000 – June, 2019: Investment Advisor Representative, First Affirmative Financial Network

#### **Professional Qualifications**

Series 7, General Securities Representative Examination (2002)

Series 66, Uniform Combined State Law Examination (2002)

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Renee Morgan.

## Item 4 – Other Business Activities

Other than for Adasina Social Capital, Renee Morgan receives no investment-related compensation nor is she actively engaged in any other business or occupation for compensation that provides a substantial source of income.

## Item 5 – Additional Compensation

Renee Morgan does not receive commissions, performance based fees, or any compensation other than regular salary and bonuses from Adasina Social Capital.

## Item 6 – Supervision

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