

# Mark Callaway brings film fest with a mission to Atlanta

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Financial adviser isn't necessarily viewed as the most altruistic of occupations, but **Mark Callaway** is doing his best to debunk that old stereotype.

As senior vice president of wealth management and financial adviser of The Indigo Group at **Morgan Stanley**, Callaway specializes in sustainable and responsible investing (SRI), which means he helps his clients invest in organizations that will bring about social or environmental change, as well as result in a financial return. For the past four years, he has also devoted a big chunk of his spare time to producing the Telluride MountainFilm on Tour ATL, the Atlanta chapter of a festival whose mission is to "inspire audiences to create a better world."

Impact investing is a growing trend in the world of finance, and it means different things to different people.

"The clients that work with us want to have their portfolios aligned with either their own personal values or, in the case of say a foundation, the investments are aligned to their mission," Callaway said.

For example, foundations looking to find a cure for cancer wouldn't want to have tobacco stocks in their portfolio. Companies with environmental focuses might want to avoid investing in fossil fuels.

"A lot of the larger foundations didn't even really think about that in the past," Callaway said. "A lot of the younger generation really want to know the companies they've invested in want to do the right thing, from an environmental standpoint, by not polluting. Or it could be supply chain, making sure this shirt I'm wearing was not sewn in Southeast Asia by a seven-year-old girl in a sweatshop."

A third prong of impact investing is governance issues, like increasing diversity within companies.

"We understand that money touches everything, and we always want to be helping our clients in philanthropy," said **P.J. Younglove Hovey**, first vice president of wealth management and financial adviser of The Indigo Group at Morgan Stanley, who has been Callaway's friend and colleague for 30 years.

After a series of events that included the dotcom crash, the Worldcom scandal and 9/11, Callaway became disillusioned with traditional methods of financial advising. After 2001, he started shifting his focus to SRI.

"Mark's got a real passion for what he does in impact investing and socially responsible investing," said **Michael Outlaw**, branch manager of Morgan Stanley Wealth Management's Buckhead

**Mark Callaway brought Telluride MountainFilm on Tour to Atlanta four years ago to help educate people about unfamiliar perspectives and cultures.**



JOANN VITELLI

Office. "It's always fun to work with someone who's not only committed to excellence, but passionate about what they're doing."

Callaway has worked in finance since 1983. He is a legacy Robinson-Humphrey & Co. adviser, and though his practice has gone through a handful of mergers and acquisitions over the years, he has stayed put.

"Though we've moved buildings, I've basically been at this same desk my whole life," Callaway said.

Callaway was born in Dayton, Ohio, and grew up in the San Francisco Bay area. His dad worked as an adjunct professor for **Stanford University** and was also in the electronics business. Around 1978, after his father's death, he moved to Georgia, where his family – the prominent family behind **Callaway Mills**, **Callaway Gardens** and the **Callaway Foundation** – is from.

Callaway served on the Callaway Foundation from age 25 to age 50, then created his own not-for-profit, **Morning Star Foundation**. His four older children

became board members at age 16.

"The sensitivity to nonprofits, I think that came from the Callaway side," he said.

Callaway graduated from **LaGrange College** and then spent some time at New York University pursuing a directing and acting career. He didn't get a degree from NYU, but instead moved back to Georgia and finished his MBA at LaGrange at night school so he could start his career in financial services. But his interest in the arts was certainly a factor that attracted his interest to Telluride MountainFilm.

Callaway heard of the festival 15 years ago when he caught one of its tour stops in WaterColor, Fla. It launched originally in Telluride in 1979 to showcase short adventure and extreme sports films, and its mission grew over time to include social and environmental impact films. Callaway reached out to the event's director, who said he would love to add an Atlanta tour stop.

The festival launched in Atlanta in 2013, and this year it nearly sold out.

## MARK CALLAWAY

**Born in:** Dayton, Ohio

**Lives in:** Brookhaven

**Age:** 60

**Current job:** Senior vice president of wealth management and financial adviser of The Indigo Group at Morgan Stanley

**Former job:** Financial adviser, Robinson-Humphrey & Co., which merged with one of the predecessor firms of Morgan Stanley

**Education:** B.S. in political science with a minor in theater and MBA, LaGrange College

**Family:** Wife, Ansley; five children, Fuller, Mary Hollis, Hayes, Gabriella and Anderson

**Hobbies:** Executive producer of Telluride MountainFilm on Tour ATL

"He really had nothing to gain from this; it is a passion project for him," said **Chris Escobar**, executive director of **Atlanta Film Society**, who coordinates with Callaway on Telluride MountainFilm on Tour ATL. "It is an extension of his and P.J.'s business philosophy that you can make money, be successful and have a positive impact on the planet."

Over 100 films are shown at the main event in Telluride, but the tour stop is condensed into about three-hour programs over three nights. Some nights have specific topics, like one night this year that focused on refugees.

"I walked away with a real appreciation for the diversity of the films, from the kind of the adrenaline rush films of folks doing adventurous and exciting things like white water rafting to human interest films about people in remote parts of the world doing things for other people," said Outlaw, who has attended the festival.

In previous years, proceeds from the festival benefit local green organizations like the **Chattahoochee Riverkeeper** and the **Captain Planet Foundation**. In 2016, proceeds benefitted **Re:imagine ATL**, a nonprofit that teaches young people about multimedia production. For Callaway, another gratifying part of putting on the festival is exposing people to unfamiliar perspectives and cultures.

"We all get kind of insulated a little bit in our lives," he said. "Unless we're really actively involved in Third World or at-risk organizations, we tend to kind of forget there's this world that's out there."

Both personally and professionally, his life centers around giving back.

"Mark Callaway has really helped shape my opinion of people in the financial investment space," Escobar said. "To me, he has raised the bar, the reputation, the stakes. He taught me to see folks in that space in a whole new light."