

Case Study
NON PROFIT

CLARITY. CONFIDENCE. STRUCTURE.



We were introduced by a current client that sits on the board of a non profit that provides research and family support for a life threatening illness. They had recently received an unexpected wave of financial support as a result of an extremely successful fundraising campaign. The organization was challenged with allocating this windfall prudently across current and future needs. As a result of our preliminary meeting, we found a number of other challenges and concerns.

| MAIN CONCERNS | HOW WE HELPED |
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| 1. No current investment policy statement | Assisted with collaborative approach to formulating Investment Policy Statement. |
| 2. Uncoordinated asset allocation as a result of investment accounts being scattered at multiple firms | Consolidated investment accounts with one institution. |
| 3. Unbalanced investment allocation with no spending policy | Implemented asset allocation and spending policy congruent with IPS. |
| 4. No comprehensive performance and cash flow reporting | Provided cash flow and performance reporting. |
| 5. Under performing, cost inefficient investments | Implemented a strategic investment plan and portfolio. |
| 6. Limited trustee knowledge | Delivered ongoing fiduciary and investment training. |
| 7. Lack of systematic document retention process | Created organizational binder for critical reports and documents. |

Let us know if we can be a sounding board or second opinion to anyone that’s important to you. For further reading or more information visit our website at www.parrmcknightwmg.com

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