

Case Study
NON PROFIT

CLARITY. CONFIDENCE. STRUCTURE.



An individual 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
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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