

Financial planning process for Organizations

Conduct qualitative assessment to understand your Conduct quantitative assessment to understand **FINANCIAL** organization's mission, values, preferences and your organization's financial profile. Review current constraints. Consult with your organization's internal financial documents including: current investments **ASSESSMENT** professionals and external advisers as necessary. and financial statements. **FINANCIAL** Assist in the development of a financial strategy Work with your organization to ensure you are aligned with your organization's goals. optimizing your financial resources. **STRATEGY** INVESTMENT Design investment policy statement clarifying Define the appropriate types of investments to fulfill objectives, policies and guidelines related to all and execute the plan based on the investment policy. **POLICY** investment funds of your organization. **STAKEHOLDER** Document process for selecting, monitoring and managing investments to ensure that the fiduciary Establish guidelines for the withdrawal and use of **FIDUCIARY** responsibilities of the board and key stakeholders funds. are fulfilled. **PLAN** Implement detailed investment plan focused on your Design customized asset allocation models based INVESTMENT organization's short & long term objectives. Perform upon industry standards to promote diversification comprehensive due diligence to select appropriate **PLAN** and manage risk. investment strategies. ONGOING Establish process to periodically examine portfolio Monitor, adjust & rebalance your portfolio based on 6 **ADVISOR**

changes in the market or organizational goals.

performance with key stakeholders.

MEETINGS