

THE EXPERTISE YOU NEED TO GUIDE YOUR ORGANIZATION'S INVESTMENT DECISIONS...



As a local government official, you understand the importance of wise investment of tax payer dollars. Through the highs and lows of the market, we all want to manage risk while striving to meet our financial goals. This is especially important when investing tax payer dollars on the state or local level. You could benefit from the advice and expertise of a stable resource that you can entrust with those funds.

We can create an opportunity for local officials to benefit from competitive yields, lower fees, and the same level of investment management otherwise available only to large investors.

DISCIPLINED INVESTMENT PROCESS



01. Organizational Assessment

- Develop a detailed understanding of goals, resources and liabilities
- Mission and objectives
- Asset/liability structure and cash flow analysis

02. Investment Policy Statement

- Draft a customized statement which provides a framework for which investment decisions can be implemented

03. Asset Allocation Strategy

- Advisory programs tailored to organizations specific needs
- Determine the appropriate mix of investment types and classes.
- Access to passive and active investment managers

04. Ongoing Review, Reporting & Monitoring

- Ensure that your investments stay aligned with your goals
- Stay up-to-date and well informed
- IPS Review

Full Range of Services

- State & Local Government
- Foundations & Endowments
- Non-Profit Organizations
- Corporations