



ECON WEALTH
MANAGEMENT

NON-PROFIT FINANCIAL SOLUTIONS

INSTITUTION AND FOUNDATION PLANNING

With Econ Wealth Management, we help nonprofit leaders align their investments, reserves, and financial strategy with the mission they're built to serve

Services for Non Profit Organizations



Develop an Investment Policy Statement (IPS)

- Define the mission statement
- Create investment goals
- Establish risk tolerance and asset allocation



Communication with Leadership

- Help select plan investment options
- Provide support to participants
- Collaborate with plan service providers



Quarterly Fiduciary Reporting

- Recommended observations and actions
- Track portfolio performance
- Review allocation and related market commentary



Annual Foundation and Entity Review

- Review strategy and any organizational needs
- Discuss organizational or mission changes
- Update investment objectives and restrictions

Why Partner with Econ Wealth?



Diligence



Savings



Education

We bring structure, transparency, and accountability to foundation management – aligning investment strategy with your mission while providing the ongoing fiduciary oversight and leadership communication needed to make every dollar work harder.

Important Disclosures: Econ Wealth Management provides general investment education and recommendations. We do not guarantee any specific investment results. Econ Wealth Management is not engaged in the practice tax preparation and no comments should be construed as tax advice. Tax information provided is general in nature. Always consult a tax professional regarding your specific tax situation.