ECON WEALTH MANAGEMENT

# COMPREHENSIVE PLANNING

## NON-PROFIT ORGANIZATIONS

*Econ Wealth, we believe every non-profit should have the financial confidence to focus on what matters most - creating lasting impact.*

## Our Specific Process

### Understanding your Organization

- Define mission and vision
- Meet the board of directors
- Develop sustainable funding plan

### Customized Approach

- Investment Policy Statement
- Set investment objectives/restrictions
- Create distribution & funding guidelines

### Advanced Portfolio Construction

- In-house dynamic management
- Goal-driven custom strategy
- Active oversight to mitigate risk

### Quarterly Fiduciary Reporting

- Investment Policy review
- Cashflow analysis and planning
- Investment strategy outlook & update

## Organizations Types

- Community Foundations
- Non-profit Associations
- Non-profit Scholarship Programs
- Private Foundations

## Why Partner with Econ Wealth?

### Organizational Guidance

We help strengthen your board's investment oversight through education, reporting clarity and policy guidance.

### Active Oversight

Our daily process monitors and adjusts portfolios to help protect and grow your organization's investments.

### Community Alignment

Work with a team that is dedicated to driving positive change in our community and yours.

***Important Disclosures:*** *The information contained herein is for educational and informational purposes only and should not be construed as personalized investment advice. All investing involves risk, including the possible loss of principal. Diversification and active oversight do not ensure a profit or protect against loss in declining markets. References to risk management, portfolio oversight, or investment protection describe EWM's investment process but should not be interpreted as guarantees of future results or risk elimination. Not all investment strategies or services are suitable for every non-profit or foundation. Organizations should consult their own legal, tax, and investment professionals before making any financial decisions or adopting investment policies.*