

We are a partner in your mission.

## Our proven approach to nonprofit investment management starts with you.

- ✓ Understand your mission and goals
- ✓ Develop and actively monitor your Investment Policy Statement
- ✓ Design the investment strategy
- ✓ Control for risk
- ✓ Communicate and educate
- ✓ Fiduciary support for your Board



Providing the right tools and appropriate level of engagement so your organization, executives, and board can *focus on your mission*.

\$4.1B\*

in institutional assets under management or consultation



5-star service with high-touch approach

>200\*

nonprofit and institutional clients

Flexible

open architecture investment platform

97%\*

client retention rate YOY

\*as of 12.31.2021

# Institutional Partnership Model



## INVESTMENT MANAGEMENT

- Discretionary investment management
- ESG integration
- Open architecture for portfolio optimization



## ADVISORY SERVICES

- Investment Policy Statement development and monitoring
- Risk-based asset allocation
- Spending policy and liquidity management



## REPORTING & ADMINISTRATION

- Customized performance reporting and comprehensive portfolio analytics
- Finance, accounting, and administrative support
- Custody, payment, and gifting services



## EDUCATION & SUPPORT

- Board support, development, and education
- Access to trusted network and strategic partnerships

## The Haverford Quality Difference

- ✓ Goals-based investment solutions designed specifically to answer the needs of your organization
- ✓ Risk management in line with your unique capacity and tolerance
- ✓ Improved governance and fiduciary oversight
- ✓ Support of your mission and program, and increased visibility to donors
- ✓ Ongoing educational opportunities for your board, staff, and donors

How can we serve your organization and its mission?

[www.haverfordquality.com](http://www.haverfordquality.com)

Signatory of:

