



Foundations, Endowments & Charities

Team

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Services

Investment Management
Financial Planning
Personal Trusts & Fiduciary
Services

Overview

Serving on the investment committee or leadership team of a foundation, endowment or charity is the ultimate act of stewardship. In these roles, board members must protect the financial interests of the organization, abide by all relevant regulation and set a course that future stewards can follow.

We help these non-profit entities and their leaders by acting as a fiduciary to the fiduciaries. In addition to providing investment advice and portfolio management, LBA shares our experience and independent perspective to help committee members implement practices that promote efficient operation and inform prudent decision making.

An important element of this work is establishing an investment policy statement (IPS). The IPS acts as a roadmap for the committee, describing the organization's investment strategy, goals and constraints. Once an IPS is in place, it guides the committee in asset allocation, security selection and other critical decisions. Further, it provides continuity and clarity as board member terms expire and new members join the board.