Fiduciary Trust International

SERVING NONPROFITS

Fiduciary Trust International is a world-class asset and wealth manager, providing tailored financial solutions to nonprofit institutions since 1935. When we join forces with your organization you gain global investment experience, a culture of advancement, and a partner with an enduring commitment to help your organization fulfill its mission.

Expertise to Meet Your Nonprofit's Needs

We actively collaborate with your nonprofit's board, staff, and other advisors, so your entire team can move forward together with shared commitment and focus.

The management solutions provided to your nonprofit are carefully guided by three core principles:

- Support the organization's mission
- Enrich the organization's future
- Protect the organization's long-term impact

SUPPORT FOR YOUR NONPROFIT

- Relationship Manager
- Philanthropic Advisor
- Portfolio Manager
- Custody Manager
- Tax Administrator

MATCHED WITH OUR COMPREHENSIVE SOLUTIONS

PHILANTHROPIC SOLUTIONS

- Board communications
- Board governance and education
- Fundraising best practices
- Planned giving advice
- Process and policy creation
- Program administration
- Revenue diversification

OUTSOURCED CHIEF INVESTMENT OFFICER

- Investment policy statement
- Mission-aligned investing

TAX COMPLIANCE AND ADVISORY

- Guidance on complex gift acceptance
- Insights on the latest trends, regulations, and legislation that could impact your mission
- Tax preparation
- Liquidity management
- Master custody
- Record keeping

Full Spectrum of Solutions

Philanthropic Advisory
We understand your mission services a community and that type of commitment requires long- and short-term demands. We offer a 360 degree look at your organization to help prioritize recommendations. Our team provides strategy and operating consultative services to help answer important questions and address pressing concerns.

Board Education and Governance
We offer educational opportunities to your board, leadership staff and existing advisors so everyone is comfortable discussing investment decisions, fundraising, program oversight and overall nonprofit administration.

Fundraising and Revenue Diversification
Diversifying your donor base is key to creating long-term sustainability for your organization. We can help ensure your revenue comes from a variety of sources and that your donor base reflects the diversity of the community you serve. We also consult on planned giving strategies and the administration of planned gifts. If needed, we serve as trustee of a charitable trust or other vehicles.

Complex Gift Acceptance
Crafting a comprehensive, yet easy-to-follow gift acceptance policy is vital in leading fundraising professionals and donors through an area of increasing complexity. Creating and adhering to strong gift acceptance policies can lead to better financial and donor relations.

Outsourced Chief Investment Officer
We work with your organization to develop a dynamic investment policy statement to establish a clear framework for all investment decisions, promote long-term discipline and ensure assets are managed in accordance with the board's responsibilities.

Mission-Aligned Investing
Many nonprofit investors are choosing to align core values with the organization's investment portfolio. This allows your nonprofit to double-down on the areas it cares about most while emphasizing its values throughout the community.

Performance Reporting
Comprehensive portfolio information is available 24 hours a day, seven days a week. Likewise, your dedicated team is available for board meetings and one-on-one conversations to discuss any performance concerns.

Master Custody Services
Keeping track of a diverse, multi-manager portfolio is time-consuming, therefore, we provide master custody services to offer a comprehensive and up-to-date view of your investments.

Tax Compliance and Advisory
We provide perspective on multiple facets of tax planning and compliance, consulting regularly with your other trusted advisors to help ensure you are aware of opportunities and risks.

Talk to Us Today

> **To learn more about how we can meet the needs of your nonprofit, please contact us at (877) 384-1111.**

US_FID_1547154_1447154
FTCI FEPC 04/23