

Investment Management

Nonprofits & Foundations

Carnegie Investment Counsel

SEC REGISTERED INVESTMENT ADVISER (RIA)

As a financial advisory firm for nonprofits and foundations, we place your organization's best interest at the heart of our work. We are prepared to partner with you to increase the likelihood of financial success, so you can focus on making a positive impact through your mission and in your community.

[CARNEGIEINVEST.COM](https://www.carnegieinvest.com)

Empower Your Nonprofit

Partnering with the right investment advisor can help grow your organization and move your mission forward.

Selecting the right financial manager for your foundation or nonprofit is a great responsibility.

At Carnegie, our firm's stability and long-standing tenure serving nonprofit organizations allow us to build enduring relationships. First, we listen to gain a thorough understanding of your organization's mission, values and resources. Then, develop an investment plan to help strengthen your financial position and create strategies to weather the challenges and capture the opportunities ahead.

We believe you should partner with an investment manager you can trust to nurture assets and donor gifts. Our structure is designed to remove conflict of interest:



RIA

Carnegie is a Registered Investment Adviser*, an independent firm with no outside shareholders to serve.



Fiduciary

We abide by an elevated level of ethical conduct for advisors. We always seek to do what is right for every client.



Fee-only

This transparent compensation model promotes trust and helps to remove conflicts of interest.

Investment Policy Statement creation.

We will help your organization's governing body meet its fiduciary duties.

- ✓ Identify acceptable investments that fit your mission
- ✓ Determine objectives and acceptable risk tolerance
- ✓ Process outlines for allocation ranges and asset classes
- ✓ Understand ongoing cash distribution requirements
- ✓ Deliver quarterly reporting and performance reviews



Request a Proposal for Investment Management

Visit: carnegieinvest.com/request-for-proposal
Email: rfp@carnegieinvest.com
Call: 800.321.2322

Investment advisory services are offered by Carnegie Investment Counsel, an SEC registered investment adviser. *Registration as an investment adviser does not imply a certain level of skill or training. For a detailed discussion of Carnegie Investment Counsel and its investment advisory services and fees, please see the firm's Form ADV on file with the SEC at www.adviserinfo.sec.gov.