

Strategic Financial Partnership to Support Nonprofits' Challenges

RBC Rochdale is a trusted investment manager for high-net-worth clients, building intelligently personalized portfolios based on their unique goals. We are committed to helping nonprofit and institutional clients achieve long-term financial success through disciplined, customized investment strategies.

Rochdale's team brings decades of experience in goals-driven investment management. With a deep understanding of the unique challenges of endowments and foundations, we offer fiduciary partnership, risk-managed portfolios, and a client-first approach designed to align investments with the mission and values. Our personalized touch allows us to partner with investment committees and boards of directors to deliver strategic insights, performance transparency, and ongoing education.

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Endowment Management and Long-Term Investment Needs

Endowments are critical financial resources for many institutions, including universities, hospitals, and cultural organizations. These groups require specialized expertise to manage their funds effectively. This includes three main areas of focus:

1. **Asset Allocation Strategies:** Aligning a customized asset allocation strategy with the endowment's objectives, risk tolerance, and time horizon. This involves balancing a diversified portfolio across a range of asset classes including equity, fixed income, and alternative investments.
2. **Risk Management:** Employing sophisticated risk management techniques to help endowments navigate market volatility and protect long-term capital, including stress testing, scenario analysis, and hedging strategies when applicable.
3. **Performance Monitoring and Reporting:** Delivering regular performance monitoring and detailed reporting to ensure transparency and accountability. This can help endowment stakeholders understand the portfolio's performance relative to benchmarks and goals.

Specialized Services for Nonprofits

Nonprofit organizations may face unique financial challenges that require tailored investment solutions to support their mission-driven activities. These organizations can benefit from the following specialized services:

- **Mission-Aligned Investing:** Rochdale can design investment strategies that reflect the nonprofit's values and mission. This may include socially responsible investing (SRI) and environmental, social, and governance (ESG) criteria to ensure investments align with the organization's ethical standards.
- **Cash Flow Management:** Nonprofits often have fluctuating cash flow requirements, and Rochdale can build custom strategies to manage liquidity needs while balancing the sustainability of the portfolio.

- **Regulatory Requirements and Governance:** Rochdale's portfolio managers are aware there may be specific oversight required, and their personal relationship could help ensure transparency among the parties involved to stay within any relevant regulations and restrictions.

Collaborative Approach and Client Education

Rochdale believes a successful partnership between an investment advisor and an institutional investor is built on collaboration and education. We can engage with stakeholders to understand their unique challenges and goals, ensuring that investment strategies are aligned with the organization's mission. We offer educational resources to empower clients with a better understanding of financial markets and investment principles. Through our relationship with City National Bank and Royal Bank of Canada, our clients can connect with comprehensive financial capabilities such as philanthropic avenues and trust services.

In conclusion, investment management firms offer a wide array of capabilities specifically designed to support the financial health and sustainability of endowments and nonprofits. Through expert asset management, risk mitigation, and mission-aligned investing, RBC Rochdale can play a pivotal role in helping these organizations achieve their long-term objectives while staying true to their core missions.

To learn more, contact your Senior Investment Consultant or Portfolio Manager. You can also visit us at www.rbcrochdale.com, or email us at citynationalrochdale@cnr.com

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