

# Independent Consulting for Foundations and NPOs

- » Safeguarding the financial stability of your organisation
- » Professional selection and monitoring of asset managers
- » Extensive peer group comparisons (e.g. fees, performance)

When investing their assets, grant-making foundations and non-profit organisations (NPOs) not only have to pay attention to their risk capacity and their long-term financial stability. They often also need to focus on the foundation's purpose and thus on a sustainable investment policy. When it comes to the subsequent mandating and monitoring of asset managers, a broad comparison of providers pays off (typical criteria are the stability of the asset manager, performance, fees, sustainability, etc.).



## Strategic asset allocation

Definition of a suitable investment strategy while taking into account the statutes as well as the intended grants.



## Sustainability (ESG)

Development of a sustainability concept that is tailored to your needs and can be easily implemented, e.g. in a workshop with the foundation board.



## Ensuring financial stability

Proprietary model for any type of foundation (perpetual, spend-down, etc.) to establish your annual expenditure budget that can be financed in the long run.



## Investment Controlling

Continuous assessment of investment results and asset managers, identification of any need for action.



## Assessment of reserves

Assessment of the reserves a NPO needs, comparison with ZEWO standards and peer group comparison (around 500 organisations).



## Absolute independence

No asset management activities. We are exclusively remunerated by our clients (flat fee or hourly wage). Flexible services, no matter the size of your assets.



## Asset manager selection

Assistance in the selection of banks and asset managers, conducting contract negotiations.



## Contact

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