



FOUNDATIONS & CHARITABLE TRUSTS

*Build a Solid Foundation for
Preservation & Growth*

Private Investment Counseling Services for Private Foundations & Charitable Trusts

As founder of Reynolds Group, Private Investment Counselors, I take pride in providing comprehensive range of highly personalized services to meet your unique needs, values and long-term financial goals. Working in concert with your wealth management advisory team, or as your Private Investment Counselor, I provide the following services to private foundations and charitable trusts:

Fiduciary Services

- Review and advise on financial planning.
- Serve as trustee, as requested.

Investment Strategy*

- Establish long-term financial goals and concrete, quantifiable investment objectives.
- Comment on recommendations for diversifying concentrated holdings.
- Determine asset allocation strategy.
- Periodically rebalance assets.
- Participate in the selection of asset managers.
- Review and advise on investment performance based on goals and objectives.

Spending Strategy*

- Determine spending policies.
- Oversee discretionary distributions.

Governance

- Develop efficient and effective governance practices.
- Assist with decision-making for investment management.
- Participate in the selection of advisers.
- Set up asset aggregation vehicles for multiple pools of assets if appropriate.

Adviser Management

- Establish evaluation, review and appraisal procedures for advisers:
 - Fiduciaries
 - Accountants and auditors
 - Legal counsel
 - Investment strategy consultant
 - Dedicated foundation/charitable trust office
 - Custodian
 - Performance monitoring service
- Meet and consult with advisers and third party vendors as appropriate.

Business Operations

- Review and assist with grant proposals.
- Review and advise on management and administration.
- Assist trustees with evaluating the management efficiency of operations.

**These activities are conducted in concert with the overall wealth management advisory team.*