Private Foundations & Endowments

Build a Solid Foundation for Preservations & Growth

Private Investment Counseling Services for Private Foundations & Endowments

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

Fiduciary Services

- Review and advise on financial and estate planning.
- Serve as trustee, executor, LLC co-manager, or protector, upon request.

Investment Strategy*

- Establish long-term financial goals.
- Create concrete, quantifiable investment objectives.
- Comment on recommendations for diversifying concentrated holdings, if any.
- Determine asset allocation strategy.
- Formulate global geographic/regional asset exposure targets.
- Periodically rebalance assets.
- Participate in the selection of asset managers.
- Review and advise on investment performance reporting, based on goals and objectives.

Spending Strategy*

- Address spending policies.
- Discuss discretionary distributions.

Governance

- Develop efficient and effective governance practices.
- Assist with decision-making for wealth and investment management.
- Participate in the selection of estate, financial planning and other 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.*

© Reynolds Group, Private Investment Counselors, LLC | 61 Otis Street • Cambridge, MA 02141
O 617.945.5157 | M 617.921.7440 | Jack@RGPIC.com | www.RGPIC.com