







Endowments and Foundations





The Asset/Liability team provides guidance on investment strategies for endowments and foundations (E&F) and institutional asset pools (IAP). The team delivers a variety of services including prospect analysis, asset allocation studies, spending policy analysis, investment policy development, and manager searches. The team also provides discretionary solutions including monitoring and facilitating trades.

This page contains sample deliverables, educational materials, E&F content, as well as links to other helpful resources. If you do not see what you are looking for, please do not hesitate to contact us!

Resources

 Resource Guide / Sample Deliverables	 Topical Spotlights
 OCIO Discretionary Solutions	 E&F Education
 Proof Statements	 ESG / Values-Based Investing

Other Helpful Resources

 Business Development page	 CAPTRUST 2022 Capital Marke...
 Investment Committee Blog	 Manager Intelligence Blog



Nonprofit Onboarding Options



Performance Reporting Page

Quick Links



CAPTRUST 2022 E&F Survey Results



CAPTRUST 2022 E&F Survey Webinar



E&F Blog



New! E&F Resource Channel



E&F Dashboards



E&F Roadmap



E&F Target Market



Mission + Markets Podcast



OCIO Discretionary Strategy Dashboard



OCIO Onboarding



Overview of Fidelity, Pershing, & Schwab



Sub-Accounting Services Summary