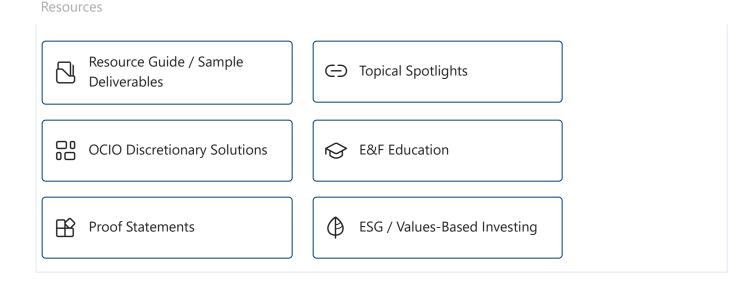
Endowments and Foundations

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!



Business Development page

CAPTRUST 2022 Capital Marke...

Investment Committee Blog

Manager Intelligence Blog

Other Helpful Resources

Quick Links

| 모 | 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 | |
| Q | Mission + Markets Podcast | |
| | OCIO Discretionary Strategy Dashboard | |
| 岛 | OCIO Onboarding | |
| 모 | Overview of Fidelity, Pershing, & Schwab | |
| = | Sub-Accounting Services Summary | |