

# ASAE Investment Management Solution

*Disciplined. Strategic. Empathetic. Principled.*

Managing members' funds has never been more important or more difficult. Complex and volatile financial markets, a proliferation of investment products and greater scrutiny have combined to create new and important decisions for fiduciaries who oversee association reserves, endowments and foundations.

Many associations do not have the investible assets to access the quality of investment advisory services they require. Those that do are often faced with the challenges of negotiating a myriad of choices, each with different costs and services.

In response, Fiducient Advisors, working with the American Society of Association Executives (ASAE), has created the [ASAE Investment Management Solution](#).

**A low cost *Uniform Solution* designed for organizations whose investible assets may not warrant the complexity of a customized approach.**

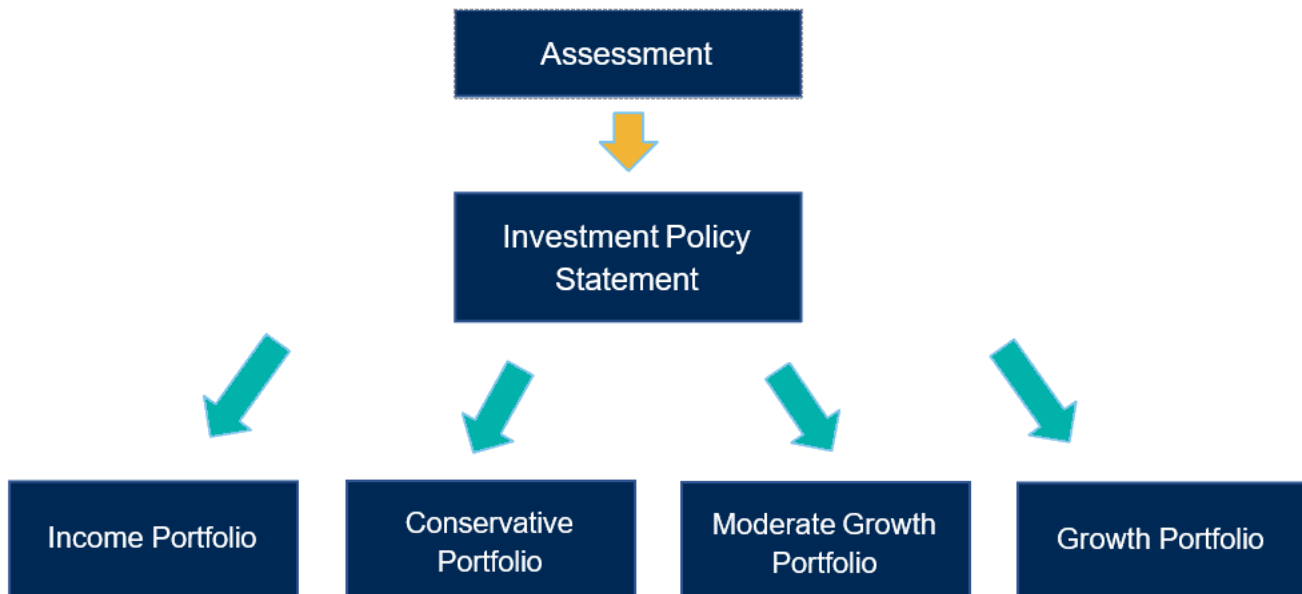
The program incorporates these elements considered best practices of today's fiduciaries:

- Investment policy statements appropriate for associations
- Asset allocation analysis
- Cost-effective portfolio management
- Ongoing and rigorous due diligence on all underlying investment managers
- Regular performance reports to help evaluate portfolio progress and manager results
- Communication and resources designed to help your organization fulfill its fiduciary responsibilities

## ASAE Investment Management Services:

- ◆ Fiduciary support
- ◆ Disciplined, diversified portfolio management
- ◆ Comprehensive and ongoing due diligence
- ◆ Portfolio evaluation and reporting
- ◆ Quarterly macroeconomic and portfolio conference calls

## UNIFORM SOLUTION



If one of the above portfolios within the **ASAE Investment Management Solution** does not address your organization's unique needs, you may have the opportunity to engage Fiducient Advisors to provide services falling within their customized consulting or management services.

Contact us today to learn more about how we can become your trusted partner.

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