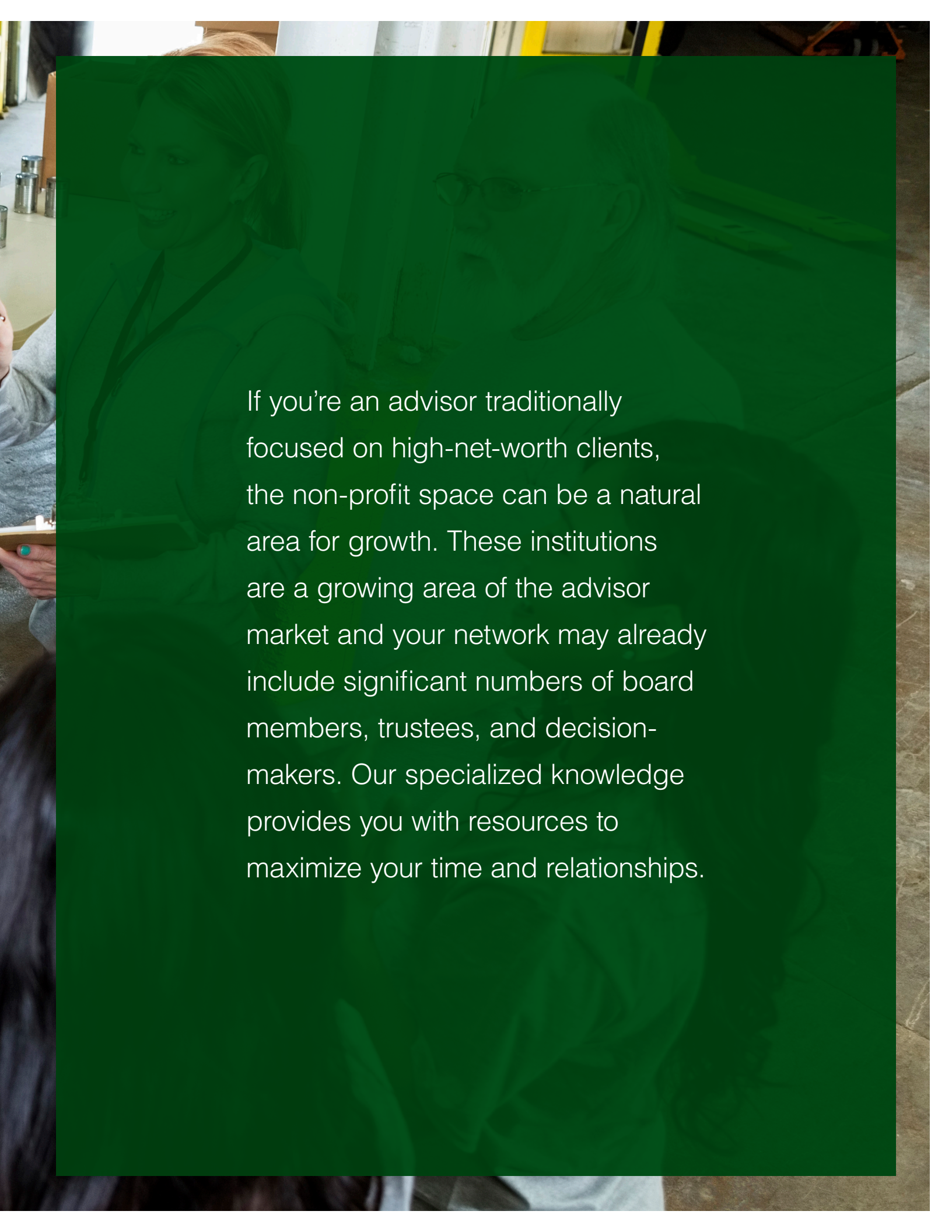




Unique Opportunities Assisting Charitable Organizations



A photograph of three people in a meeting, overlaid with a dark green semi-transparent rectangle containing text. The people are a woman on the left, a man in the center wearing glasses, and another woman on the right. They are all looking towards the right side of the frame. The background is slightly blurred, showing what appears to be a conference room setting with a table and some equipment.

If you're an advisor traditionally focused on high-net-worth clients, the non-profit space can be a natural area for growth. These institutions are a growing area of the advisor market and your network may already include significant numbers of board members, trustees, and decision-makers. Our specialized knowledge provides you with resources to maximize your time and relationships.

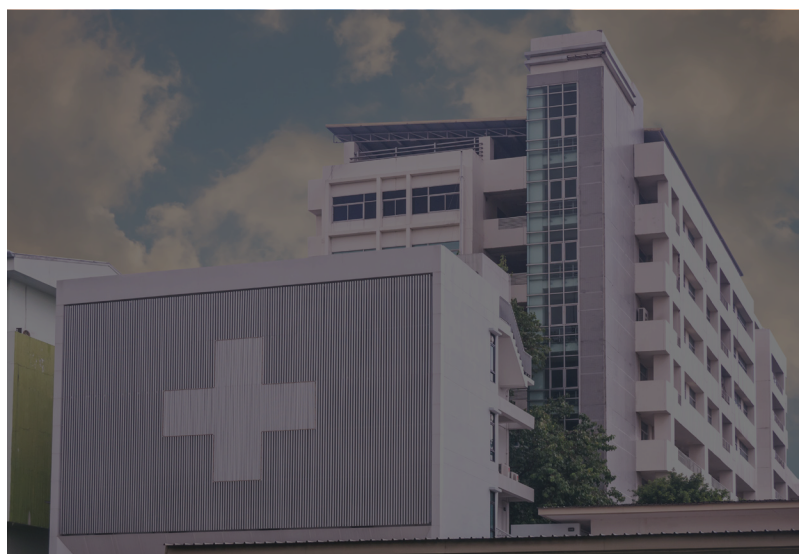
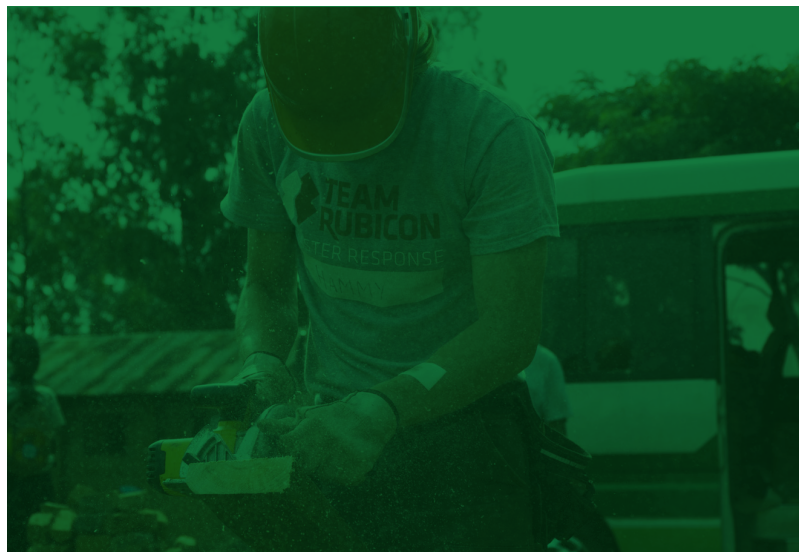
Charities, hospitals, foundations, and schools make up a tremendous opportunity for financial advisors.

These organizations are generally classified under section 501(c)(3) of the IRS code. They may have professional staff but also usually have volunteer boards – prominent members of the community that you may already know as part of your network.

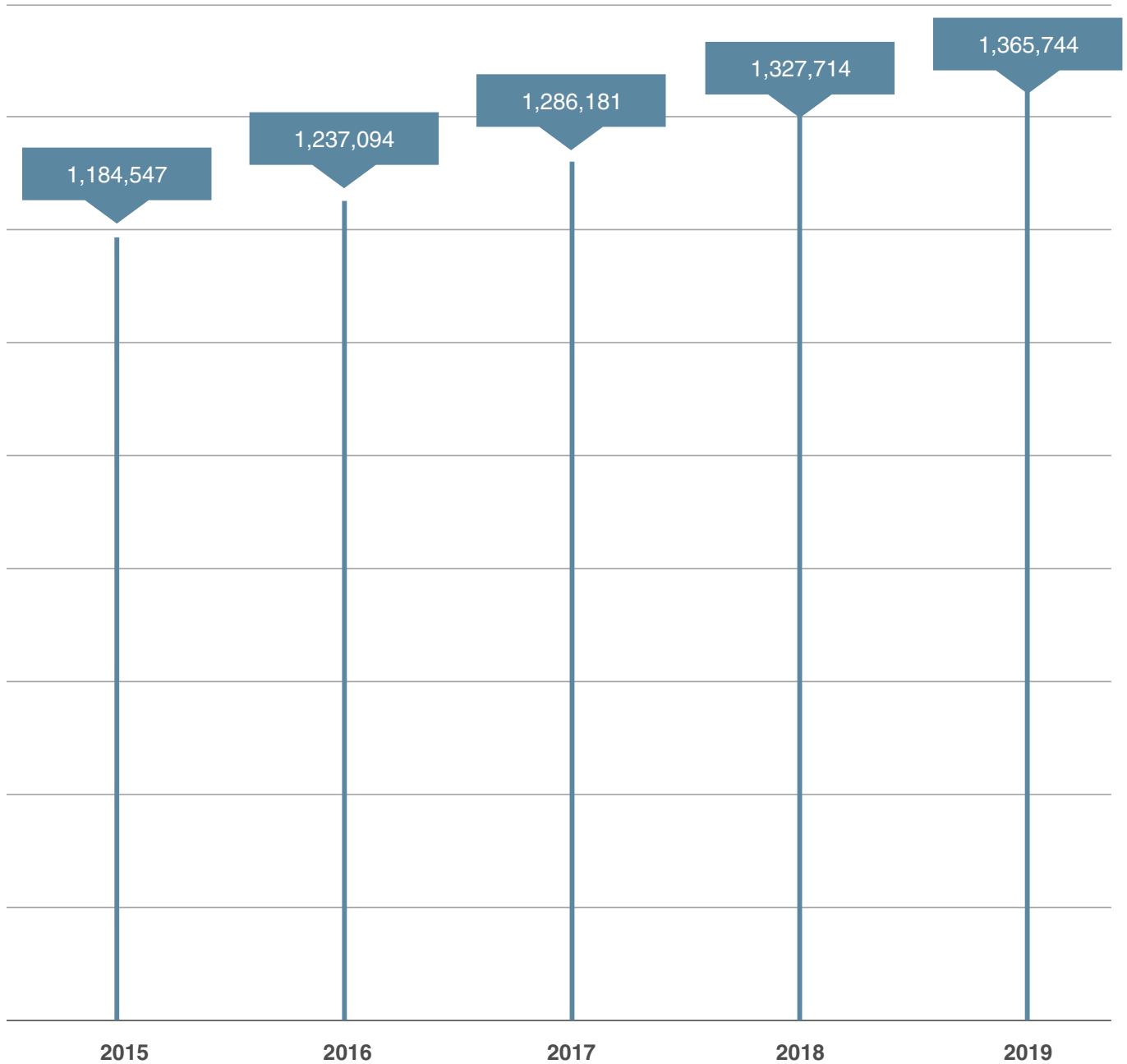
America's endowments and foundations collectively control trillions of dollars of investable assets and the number of non-profits is growing. According to the IRS, the number of 501(c)(3) organizations has increased in each of the last four years.

Do you have any clients like this?

Endowment and foundation board members are prominent people in the community such as attorneys, accountants, and business owners.

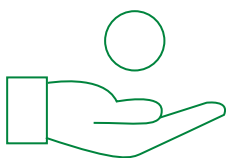


Year-by-Year Number of 501(c)(3) Organizations



Source: Internal Revenue Service

Endowments & Foundations Have Some Unique Considerations



SPENDING NEEDS

Every organization has unique charitable goals and must find the best way to use their assets to achieve these goals. Some organizations may be more focused on growing their assets, while others may be more focused on spending them. Donor restrictions may also affect how these decisions are made.



GROUP DYNAMIC

Most often, you are working with a group of individuals that make up a board or committee. It is important to understand this group dynamic and fully incorporate decision-makers into the process.



FIDUCIARY STANDARD

Board members and trustees are fiduciaries, meaning they are required to put the interests of their organization above their own. Best practices include understanding all applicable laws and governance issues, formalizing policies and procedures, and effectively monitoring their portfolio to ensure it remains on track to reach its goals.



FUNDRAISING

Includes annual giving, major giving, capital campaigns, and planned gifts (i.e., bequest intentions and gifts from estates). These assets can be a meaningful part of the overall budgets for many operating foundations.



Manning & Napier's Expertise

Manning & Napier can provide you with training and content to help attract and serve these clients. Resources include:

PORTFOLIO MANAGEMENT

We offer a variety of investment products from complete multi-asset class solutions suitable for a range of different risk tolerances, to specific asset class products that allows you to create a customizable asset allocation.

FUNDRAISING

Learn how to differentiate your approach through an understanding of basic fundraising techniques: the types of gifts organizations most value, the typical fundraising cultivation process, and trends driving changes in the fundraising industry.

POLICY DEVELOPMENT

Learn best practices for customizing investment and spending policies and meeting the needs of your clients and prospects.

YOUR PARTNER ON QUALIFIED NEW BUSINESS OPPORTUNITIES

Where needed, we can partner with you to target new business opportunities by identifying crucial pain points and developing strategies to get your foot in the door. We believe the most attractive advisors for non-profits are those that can solve problems for their clients and position themselves as valued resources.

Working With Manning & Napier

40+ years of experience managing assets for endowments and foundations.

An active management approach that allows us to manage risk in a variety of market environments.

A partnership that can assist in business development with charitable organizations.

A wide variety of investment options.

To learn more about our Endowment & Foundation solutions, please contact us at
(888) 825-4493 | info@manning-napier.com | www.manning-napier.com



Independent Perspective | Real-World Solutions