Philanthropic Services

Service Offerings

At ALINE Wealth, our integrated services and customizable solutions are designed to address the unique challenges of endowments, foundations, and nonprofits with a focus on helping them realize both their short and long-term goals. Our process involves working directly with finance committees in order to come to a joint resolution on portfolio management, structure and an investment policy that reflects the vision stakeholders have for the future.

Our Services:

Develop, Review, and Monitor Investment Policy Statements

We work with clients to develop custom Investment Policy Statements which are aligned with the organization's stated objectives and constraints. IPS construction will be built to address return objective, risk tolerance, liquidity, time horizon, tax concerns, legal concerns, and unique circumstances.

Asset Allocation and Portfolio Construction

We work with clients to identify areas of investment opportunity, develop asset allocation strategies and provide ongoing monitoring of investments and reallocation of assets, when and where appropriate.

Customized Reporting and Analysis for Your Investment Committee

We create both high-level and detailed client portfolio and investment performance reports.

Fiduciary Compliance and Oversight

We will provide our professional guidance to help organizations meet their obligations as fiduciaries.

Risk Management

We will provide ongoing monitoring of the organization and its accounts to ensure proper due diligence is taking place.

ALINE WEALTH