

How BULLWEALTH's Investment Advisory & Consulting Solutions works with you

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As we visit different not-for-profit organizations and talk to their executives and Investment Committees, we often find that there is some confusion as to how a relationship with an investment advisory and consulting firm is implemented. In most cases in the investment world, changing a mandate from one firm to another often means selling everything you already hold and buying whatever the new firm has to offer. This is not the case when a not-for-profit transitions to a BULLWEALTH investment advisory and consulting solution.

A firm like BULLWEALTH does not sell any of its own products. In the case of BULLWEALTH, we don't even have any of our own products. A firm that offers such investment advisory and consulting solutions should act as if the not-for-profit has hired its own internal Chief Investment Officer (CIO). However, rather than going to the significant expense of hiring an internal CIO, the not-for-profit can leverage the resources and expertise of a firm like BULLWEALTH to act as the not-for-profit's CIO at a more reasonable cost.

Firms like BULLWEALTH offer unbiased, independent advice when selecting an investment manager by acting solely on behalf, and in the best interest, of the not-for-profit and its Investment Committee. Changes are only recommended when necessary based on the services offered. These services include: developing a customized asset allocation based on the not-for-profit's objectives, reviewing the not-for-profit's Statement of Investment Policy annually, searching and presenting investment manager changes or additions, meeting quarterly to present the portfolio- and manager-level risk and return characteristics against peer groups and benchmarks, as well as ongoing quarterly reporting and measurement.

In this issue, two of BULLWEALTH's Managing Partners and Portfolio Managers, who advise our not-for-profit clients, describe the implementation and transition process of our investment advisory and consulting solution. We have also asked one of our clients to describe their experience. I hope you find this edition of Foundations to be useful and informative.

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