

Foundations & Non-Profits

Your organization does important work in the community – let us help by managing the funds that are necessary to keep this work going. Trust Point currently provides philanthropic services to over 203 non-profit organizations. We have the infrastructure and acumen to meet the specific investment management and thorough recordkeeping needs of your foundation.

Experience with Foundations and Non-Profits

- Reporting to track contributions, disbursements, earnings and spending rates
- Preparing calculations of annual distributions, based on spending rates
- Recording of donor-specific contributions
- Providing audit support
- Processing and reporting of in-kind charitable gifts from donors
- Assisting with donor development strategies and education
- Presenting to your board and committees
- Fiduciary & Stewardship Awareness

Investment Expertise

- Trust Point's independent status means unbiased investment selection with no conflicts of interest
- Unique blend of investment options, which include, Socially Responsible Investing and Environmental, Social and Corporate Governance
- Clear investment philosophy and proven principles
- In-house team of professionals continuously monitoring and researching investment options

Fee Transparency

- Tier-structured fee schedule that decreases as the balance increases
- Reduced fee schedule specific to foundations and non-profits
- 100% transparent fee schedule structure that is simple and easy to understand
- Comprehensive services are all included in your fee

Exceptional Service

- Deeply committed to exceeding your expectations
- Ongoing & proactive communication - we prefer face-to-face meetings
- Nothing less than an objective, ethical, and transparent relationship
- Advisory & planning, including Investment Policy Statement consultation

About Trust Point

For more than a century, Trust Point has provided a full range of financial and advisory services to individuals, families, businesses and charitable organizations.

Our philosophy is simple. We believe that in doing what is best for our clients, we will be doing what is best for Trust Point.



Trust & Estate
Administration



Investments &
Wealth Management



Retirement
Plans



Foundations &
Non-Profits



Family
Office