



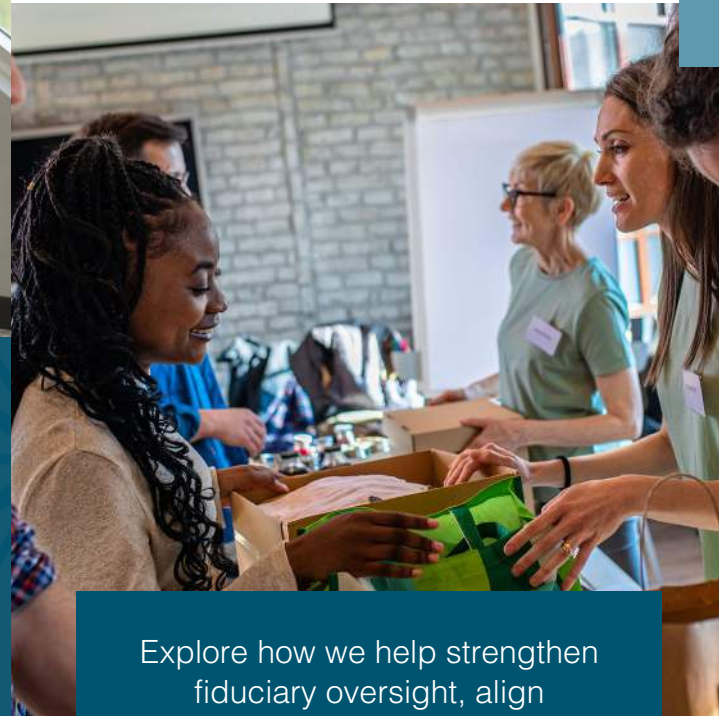
Partnering for Your Mission's Long-Term Success



Trust Point has a strong reputation working with many non-profit organizations and foundations to help them fulfill their mission. Backed by over 110 years of experience and principled objectivity, we provide expertise to support your goals. Our team delivers practical education, actionable policies, and ongoing guidance to help your board, executive team, and donors manage resources with clarity and confidence. Together, we simplify and secure your wealth so your mission can thrive for generations.



Non-Profit Education Menu



Explore how we help strengthen fiduciary oversight, align investments with your mission, and educate your stakeholders.

Join *Giving Point*

Scan the QR code below to sign up for our newsletter, *Giving Point*. Stay informed with insights and resources tailored for non-profit leaders.



www.trustpointinc.com
(800) 658-9474

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Boards & Committees

FIDUCIARY & STEWARDSHIP AWARENESS

The fiduciary standard, the duty of care, loyalty, and obedience, guides non-profits in investment oversight. At Trust Point, we partner with your organization to establish and review processes that support and strengthen this stewardship.

SPENDING POLICY

Your spending policy should be reviewed periodically as part of strong governance. This process impacts the long-term sustainability of your assets and ensures alignment with the ongoing support of your mission.

INVESTMENT POLICY STATEMENT

An essential part of investment stewardship is examining the portfolio's role in meeting spending and contribution goals. This review leads to the development of the Investment Policy Statement (IPS). Our team at Trust Point can assist in reviewing or developing your IPS.

INVESTMENT REVIEW

We are available to meet with your board and finance committees to review performance, provide market updates, and support your Investment Policy Statement compliance.

Executive Team & Development Staff

AUDIT SUPPORT & CUSTOMIZED REPORTING

Along with monthly statements, Trust Point can provide periodic, customized reporting to meet your organization's needs.

IN-KIND GIFTING

We offer an in-kind gift handout to share with donors and advisors, and coordinate with the donor's financial advisor to help transfer appreciated securities.

TRAINING & EDUCATION

Board members and staff come from diverse backgrounds with varying levels of fiduciary and investment knowledge. In addition to reviewing accounts, we provide education to help interpret reports and statements.

SUCCESSION PLANNING

Our team can also help with the transition of board committees and staff to ensure new leadership understands the organization's investment portfolio.



Donors

DONOR EDUCATION & PRESENTATIONS

Many donors want to know how they can support their favorite organizations, both during their lifetime and as part of their estate plan. Trust Point offers charitable and estate planning education which includes:

- Charitable Tax Planning Strategies
- Qualified Charitable Distributions (IRA)
- Testamentary Giving
- Donor-Advised Funds
- Private Foundations
- Charitable Trusts

See the chart below for popular giving vehicles we can help your donors explore.

