

Not-for-profit organizations have special needs in addition to the investment management of their assets, and the investment advisor plays a vital role in helping the board accomplish its goals.

Leaders of charitable organizations are often faced with the challenge of dependency on volunteer committees. Many board members are busy with outside responsibilities of work and family so their time is limited and it is important to get the most out of board meetings and committee meetings. When money is involved, there is the added fiduciary duty and pressure to make the right decisions. Some board members do not have the expertise to be knowledgeable on all aspects of investments making it easy not to act because of indecision or lack of agreement among members. In addition, as board membership constantly changes, Cambridge Advisors can provide the consistency your organization needs to keep the investment plan focused and on track.

When Cambridge Advisors is the investment manager, we work closely with the board or appropriate committees to guide them and implement a prudent investment plan. We assist them with their Investment Policy Statements and serve as a resource when they have questions on how other organizations deal with specific issues. We take care of managing the portfolio on a daily basis so that the appropriate actions can be taken at an appropriate time. We provide reports to the board or committee to help them as they plan and make decisions. We work as part of the team and explain the reasons behind our strategy and decisions. We also provide education as needed so that everyone on the committee understands the strategy and feels confident in their role as a board member.

If you would like to submit a request for proposal, please contact [Lori Liffing](#) or [Michael Bridgman](#).

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