

# Fiducient Advisors

*is a proud TANGO Partner*

**Services:** Investment Management/Advisory Services



For nearly three decades, **Fiducient Advisors** has supported investment fiduciaries/committees by delivering customized investment solutions & governance advice. This includes close to 300 nonprofit organizations across the country for whom Fiducient supports their unique asset pools, whether that be an endowment, foundation, reserve pool, or the like. Focused exclusively on investment & governance support, Fiducient maintains offices across the country with 220+ professionals and over \$280 billion in fiduciary assets under advisement/management. Our customized approach ranges from Implemented Consulting (i.e., traditional advisory/nondiscretionary) to OCIO (Outsourced Chief Investment Officer) as well as combinations of the two, per a client's preferences.

Fiducient supports pools over \$15 million. Larger pools often have more complex investment & governance needs, such as private markets, ESG, or aligning the organization's pool(s) with the broader

mission. Supporting a broad array of nonprofit organizations (e.g., education, healthcare, cultural, etc.), Fiducient looks forward to bringing our experience to bear in support of your nonprofit.

## KEY SERVICES

- The Fiducient Advisors "Investment Office" – a true extension of your organization's board, investment committee & staff
- Fully Tailored Solutions
- Proprietary Fiduciary Governance Calendar – proactive stewardship for your Investment Committee
- Strategic Asset Allocation
- Risk Budgeting
- Manager Search & Selection – supported by dedicated manager research and 30+ CFA charterholders
- Mission-Aligned Investing
- Spending Policy Analysis & Development
- Fiduciary Education for your Board/Committee/Staff
- Customized Performance Reporting
- Preparing Your Organization for Accreditation

## SPECIAL SAVINGS FOR TANGO MEMBERS

- At no cost, a no-obligation review of your organization's investment portfolio(s) with a member of Fiducient's team.

## CONTACT INFORMATION

### Fiducient Advisors

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**TANGO Region Served:**  
*Nationwide*