



ENDOWMENT ADVISORY SERVICES

How it Works

THE FOUR STEPS OF EAS



1 | INTAKE AND ASSESSMENT

Initial interviews with organizational staff to evaluate current state

Document assessment – Investment policy, constating documents including by-laws, other relevant policies (planned giving, privacy, conflict of interest)

Investment assessment – initial review of investment managers, governance structures and decision-making processes



2 | FORMAL REVIEW

Policy Review – We will suggest amendments to relevant policies to reflect the organization's future state requirements

Governance Review – We will suggest changes to streamline and improve decision-making processes around investment oversight

Investment Requirements – We work with the Board, Investment Committee (IC) and Staff to finalize investment requirements



3 | INTAKE OF INVESTMENT MANAGERS

We will identify Investment providers who are well-suited for the organization's needs

If necessary, we will help prepare a "Request for Proposals" to invite appropriate managers to submit proposals

We support the Board, IC and Staff through the decision-making process



4 | ONGOING SUPPORT

We support the ongoing review of investment policies and structures

We provide advisory support around planned and complex gifts

We host an annual meeting to re-assess investment requirements

To learn more about how we can help your organization, visit us at spirephilanthropy.com

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