



Beacon Pointe is an independent advisory firm dedicated to providing thoughtful investment guidance and comprehensive consulting services to institutions.

Client Service Approach

Beacon Pointe consultants are proactive partners who seek to be an extension of a client's internal staff. They are dedicated to understanding all aspects of the institution's investment objectives, conveying knowledgeable guidance, and providing exceptional service to a wide array of clientele.

Since firm inception in 2002, Beacon Pointe has served in a fiduciary capacity, reflecting each client's vision and values in every aspect of its service.

Clients Served

- ☐ Arts and Cultural Organizations
- ☐ Educational Institutions
- ☐ Healthcare Organizations
- ☐ Faith-Based Organizations
- ☐ Corporations and Associations

The Beacon Pointe Process

To uphold our fiduciary commitment, our team utilizes a client-focused approach to investment advice intentionally separating the key duties of consultant, custodian, and asset manager, thereby both minimizing conflicts of interest and making decisions in the best interest of clients.

Examine

- ☐ Understand strategic mission
- ☐ Outline client objectives
- ☐ Determine risk tolerance

Establish

- ☐ Define fiduciary guidelines
- ☐ Create optimal investment structure
- ☐ Launch investment program

Execute

- ☐ Implement investment processes and procedures
- ☐ Risk management
- ☐ Ongoing proactive advice

Consulting Services

The Institutional Consulting Services Group emphasizes the importance of process in order to understand each unique client, design a customized strategy and oversee the investment portfolio. Beacon Pointe proactively partners with clients in an advisory (non-discretionary) or an outsourced CIO (discretionary) capacity, or through a hybrid approach.



High-Level Objectives

- ☐ Investment Policy Development and Review
- ☐ Asset Allocation Modeling
- ☐ Monte Carlo Analysis
- ☐ Custodial Search and Selection

Research and Performance

- ☐ Manager Research and Selection
- ☐ Performance and Manager Monitoring
- ☐ Portfolio Attribution Analysis
- ☐ Fee Negotiation and Expense Review

Support Services

- ☐ Transition Analysis and Oversight
- ☐ Performance Review Meetings with Consultant
- ☐ Fiduciary Guidance and Education
- ☐ Extension of Staff and Back Office Operations

Value Services

- ☐ Board Engagement and Strategic Planning
- ☐ Assistance with Donor Development
- ☐ Board, Committee and Staff Education
- ☐ Philanthropic Partnerships



Mission-Focused Support

Institutional clients of Beacon Pointe are served by a team of dedicated investment professionals who employ their industry knowledge, community involvement and premier technological tools to enhance the overall service experience. By doing so, this framework allows Board and Committee members to focus on mission-level strategy and overall execution of the organization's goals.