MASON
INVESTMENT ADVISORY SERVICES, INC.

INSTITUTIONAL SOLUTIONS

INVESTMENT CONSULTING SERVICES FOR FOUNDATIONS AND ENDOWMENTS:

A NATIONAL SOLUTION WITH A LOCAL FOCUS

Foundations and endowments have a range of options when it comes to investment consulting services. These options include local financial advisors who reside in the community as well as larger regional or national firms that specialize in working with charitable organizations.

For those who prefer to work with local advisors, common reasons include:

- The convenience of working with advisors who are “just down the street” and easily accessible.
- An interest in working with advisors who may have existing relationships with donors or who may be donors themselves.
- A desire to support businesses that are part of their community.
- The benefit of working with a partner that is familiar with the local area, issues, and trends.

While working with a local financial advisor has benefits, it’s important to realize that larger national or super-regional investment consulting specialists often have more resources to meet a foundation’s needs.

- Previous experience working with foundations and endowments and other non-profits.
- A broader range of suitable investment options, including more sophisticated strategies, than may be available locally.
- A number of additional services including educational initiatives for investment committees and boards.

Working with Mason – A Foundation and Endowment Specialist

Mason specializes in providing outsourced chief investment officer (OCIO) services to foundations and endowments with an offering that is specifically designed to bridge this divide to meet the needs of these unique organizations. Mason also provides non-discretionary consulting services.

Mason’s consultants are typically “on site” quarterly or more often in some cases. This combined with our donor development capabilities and support, including customized communications and foundation reports to help attract, retain, and expand donor relationships, often addresses many of the concerns a foundation may have over losing the convenience and built-in donor relations that local advisors may offer.

Getting the Best of Both Worlds

For foundations that wish to "go local" but still want the benefits of a larger foundation and endowment specialist, Mason offers a unique solution:

- Want the best of both worlds? What if you could keep your assets local, and use the services of a foundation and endowment specialist? Mason offers a sophisticated investment management and aggregated reporting solution that maintains investments managed by Mason and assets managed locally.
- In addition to Mason's ability to incorporate locally managed assets, Mason's marketing, donor development, and constituent education support services have expanded in recent years. These services include marketing documents as well as educational materials, webinars, and presentations intended for staff, committee, and board members as well as current and prospective donors.
- For foundations and endowments that are interested in private equity, Mason offers an attractive third-party solution to access this market that addresses many of the primary challenges of traditional private equity limited partnerships. Some of these challenges include: fees, performance reporting frequency, illiquidity, tax reporting, cash flow management, and others.

Regardless of the strategic choices of a foundation's board and investment committee, Mason remains committed to providing customized and comprehensive OCIO, non-discretionary consulting, and aggregated reporting solutions – spanning investment management and ancillary services to satisfy a foundation's mission and enhance its presence and value to the community it serves.

About Mason Investment Advisory Services, Inc.

Mason Investment Advisory Services, Inc. is an investment advisory firm registered with the SEC and is a privately owned firm with a national scope. Mason is devoted to comprehensive investment management and consulting for endowments, foundations and other institutional portfolios and financial planning and wealth management for individuals. As of 12/31/24, Mason managed $13.3B in institutional and private client assets nationwide. Mason was founded in 1982 in the Washington, DC area.

To learn how Mason's institutional consulting and OCIO solutions can help your organization, please contact Will Thorpe at 703-716-6000 or wthorpe@masoncompanies.com.

Disclosures