

## NOT-FOR-PROFITS

### ALIGNED WITH YOUR MISSION

As a fiduciary, Miles Capital has been honored to work with not-for-profit organizations to help achieve their mission for nearly 30 years. We serve as a comprehensive outsourced investment department, creating a complete investment program that is designed uniquely for each organization. Our asset allocation and customized investment approach puts your organization first.



### Save Time

#### ADDITIONAL RESOURCES & SERVICES

We provide a full suite of services that add to your capabilities. We are committed to providing unsurpassed service, taking responsibility for your investment portfolio and becoming a part of your organization and team.



### Add Value

#### CAPITAL MARKETS SOLUTIONS

We offer fully customized investing and portfolio management. Think of it as a strategic plan for your investments. We identify the most important goals for your organization's assets and then design a fully customized, forward-looking solution to help deliver the investment results that matter to you.



### Mitigate Risk

#### RISK MANAGEMENT

We design portfolios to align with your needs and provide downside risk mitigation. Our approach helps to provide stable income and predictable cash flows, but is agile enough to take advantage of market opportunities. Dedicated portfolio management constantly evaluates your portfolio, managing risk along the way.



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### Strategic Partnership

#### AN EXTENSION OF YOUR TEAM

Miles Capital provides unparalleled client service. Our focus is on aligning your investment portfolio with your mission in order to help you achieve the results that matter most to you. Our professionals not only average 18 years of investment experience, but also serve on not-for-profit boards or have had experience working with organizations like yours. Our goal is for every client to feel as if they are our only client.

## What Does An Outsourced Investment Department Do For You?

Managing portfolios for nonprofits and charities requires a deep understanding of each client’s needs, constraints, and objectives as well as capabilities across all asset classes. Miles Capital provides independent, solutions-focused investment management, serving as an outsourced investment department for our not-for-profit clients. We are an extension of your team, creating a comprehensive investment program designed uniquely for you.

### OBJECTIVES-BASED ASSET ALLOCATION®

We customize the portfolio to align directly with your unique needs.

### EDUCATION & GUIDANCE

We provide ongoing education, training, and market commentary for our client’s teams to enhance their depth.

### PERFORMANCE MONITORING

We monitor and manage performance continuously, relative to your custom benchmarks, and report to the Board.



### INVESTMENT POLICY STATEMENT (IPS)

We analyze the asset/liability needs, cash flows, and constraints to develop and codify objectives in the IPS.



### ASSISTANCE TO THE BOARD

Communication includes guidance through challenges or market changes, and participation in strategic planning.



### COST CONTROL

We maintain best execution for our clients (goal of lowering trading costs) and aid in custodial search and selection.

## Additional Services - All Included At No Additional Costs

CLIENT SERVICES	BANKS	BROKERS	MILES CAPITAL
Fiduciary			√
Cost Control			√
Liquidity Analysis & Planning			√
Daily Compliance with Investment Policies			√
Spending Policy Analysis		√	√
Cash Flow & Liquidity Management Support			√
Trading, Best Execution, Settlement Support	√	√	√
Committee / Board Communication and Meetings	√	√	√
Quarterly Package Reporting			√
Education & Guidance			√
Economic Outlook, Strategy & Firm Communications	√	√	√
Custody Search & Liaison Services			√
Operational Support (Including Daily Reconciliation)	√		√
Proxy Voting			√

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