

Jerry Jevic

(856) 858-1356
jerry.jevic@opco.com

Matthew Wukitsch

(856) 858-1355
matthew.wukitsch@opco.com



Partnering for Success

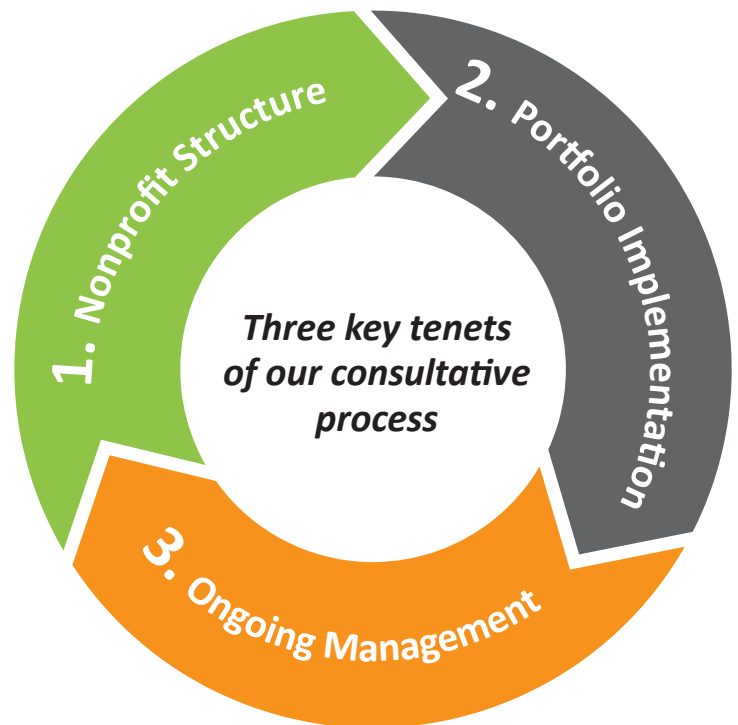
A hands-on, mission-focused approach for today's nonprofit.

Nonprofit

At Oppenheimer Asset Management, we work tirelessly to understand the unique needs of our nonprofit clients in an effort to help them fulfill their missions and set shared expectations.

As trusted advisors, we work closely with nonprofits that are making an indelible impact on the world. Whether it's educating tomorrow's business leaders, protecting the environment or funding critical research that could lead to important medical breakthroughs, we're helping them achieve better outcomes.

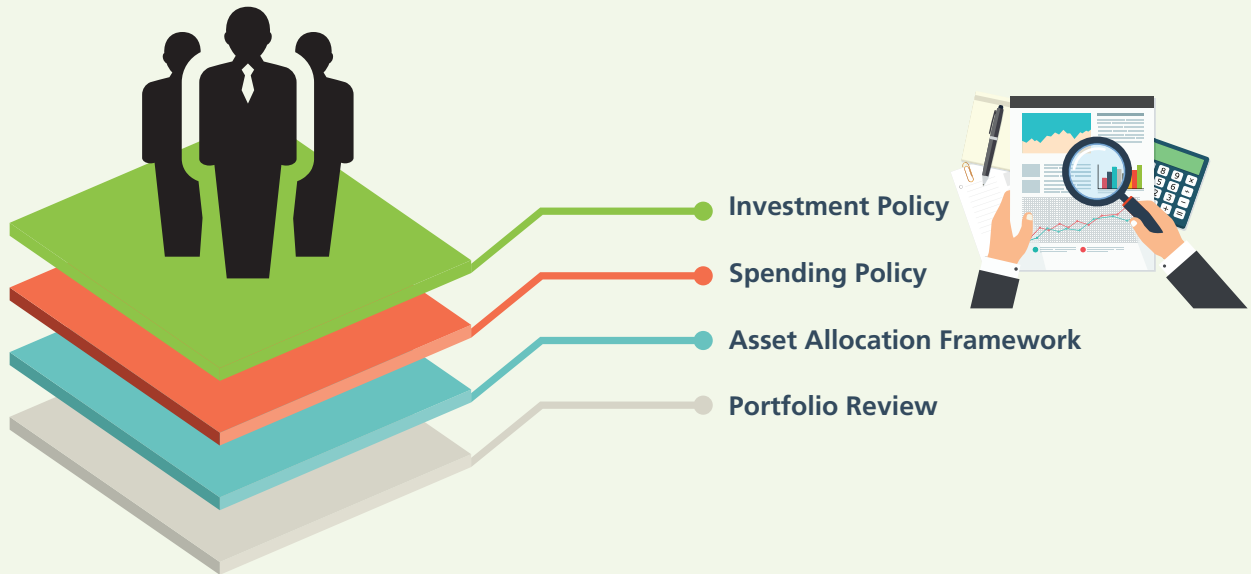
Today, meeting target returns has never been more important as nonprofits face increasingly complex capital markets, shifting regulatory winds and increased fiduciary responsibility. Whatever the challenge, we are here to support your needs as a trusted advisor.



1

NONPROFIT STRUCTURE

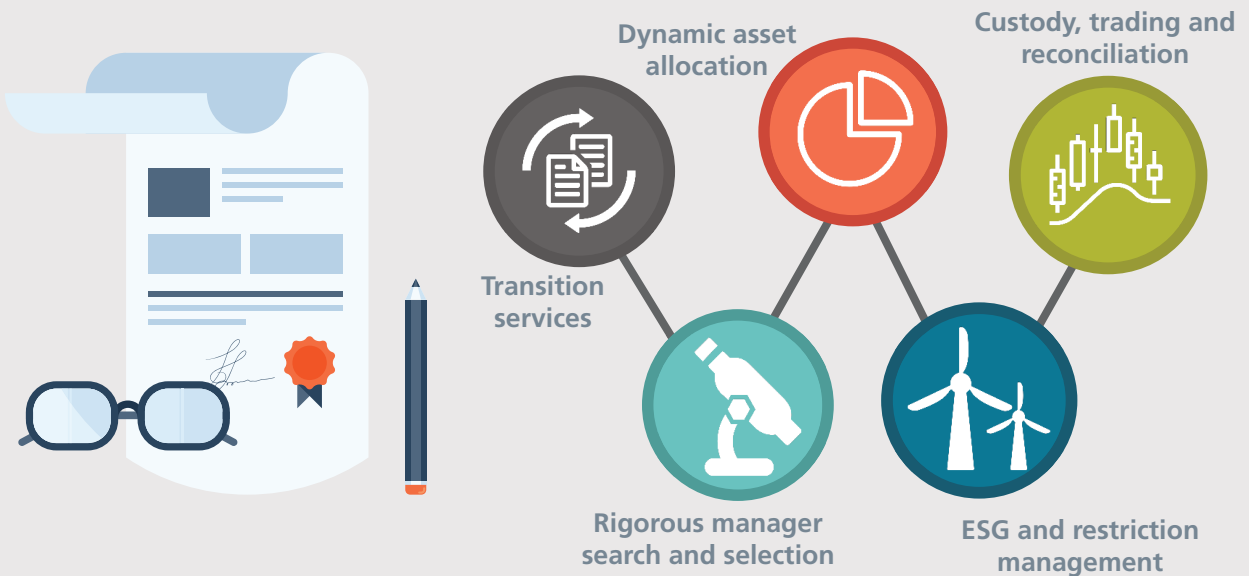
The ability to successfully manage a nonprofit starts with a solid structure. After gathering detailed insight into a nonprofit’s goals and objectives, we establish—or review and amend—the policies that help foster long-term success.



2

PORTFOLIO IMPLEMENTATION

When it comes to investing, taking decisive action can be a difference maker. With a nonprofit’s stated policies as a guide, we can create a portfolio that helps ensure compliance and best positions the nonprofit for success. We combine a strategic approach to investing with a real-time view of the world. Our capabilities include:



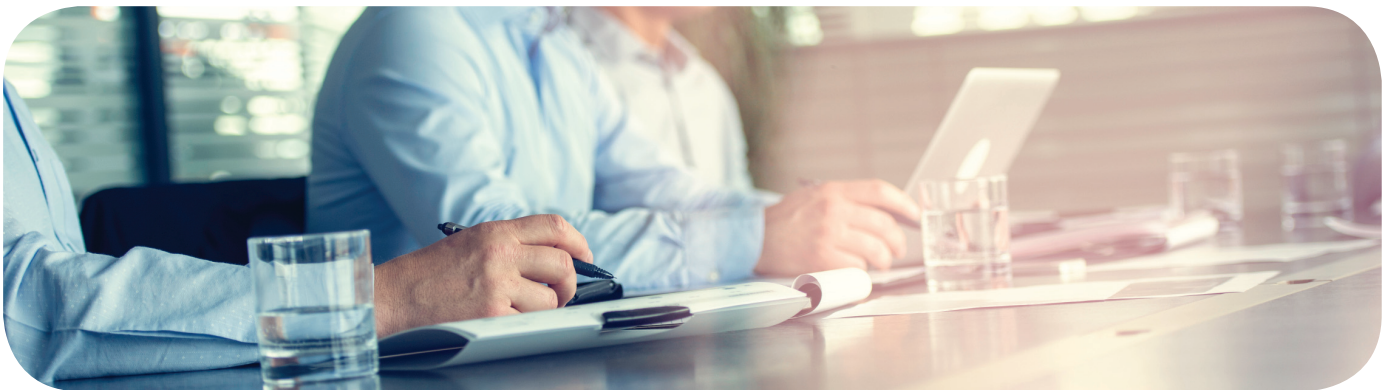
3 ONGOING MANAGEMENT

Consulting with our nonprofit clients doesn't end with portfolio construction—that's just the beginning. Keeping a watchful eye on capital markets, manager performance and portfolio risk are a few of the around-the-clock duties we take very seriously. At Oppenheimer Asset Management, we're committed to excellence in oversight and service, which encompasses these core components:



Learn More

Our comprehensive investment capabilities and tailored approach to client relationships inspires confidence that your nonprofit's mission is our mission.



*For more information or to schedule a meeting,
please contact us today.*



Oppenheimer & Co. Inc.

222 Haddon Avenue, Suite 301

Haddon Twp, NJ 08108

(856) 858-1044 Fax

© 2019 All rights reserved. This report is intended for informational purposes only. All information provided and opinions expressed are subject to change without notice. The information and statistical data contained herein have been obtained from sources we believe to be reliable. No part of this report may be reproduced in any manner without the written permission of Oppenheimer Asset Management or any of its affiliates. Any securities discussed should not be construed as a recommendation to buy or sell and there is no guarantee that these securities will be held for a client's account nor should it be assumed that they were or will be profitable. There can be no assurance that any investment strategy will be successful. Securities discussed herein should not be viewed as a recommendation to buy or sell, and there is no guarantee that they will be held in a client account or they will be profitable.

Oppenheimer Asset Management is the name by which Oppenheimer Asset Management Inc. (OAM) does business. OAM is an indirect, wholly owned subsidiary of Oppenheimer Holdings Inc., which is also the indirect parent of Oppenheimer & Co. Inc. (Oppenheimer). Oppenheimer is a registered investment adviser and broker dealer. Securities are offered through Oppenheimer.

Neither Oppenheimer & Co. Inc. nor any of its affiliates, directors, officers or employees provide legal or tax advice. Clients are encouraged to consult their own legal and tax advisor before making any investment. Asset allocation does not guarantee profit or protection against loss. Certain tax related services are offered through Oppenheimer Trust Company of Delaware and its relationships with select independent tax professionals. Please contact your financial advisor with any questions.