

# Partnering for Success

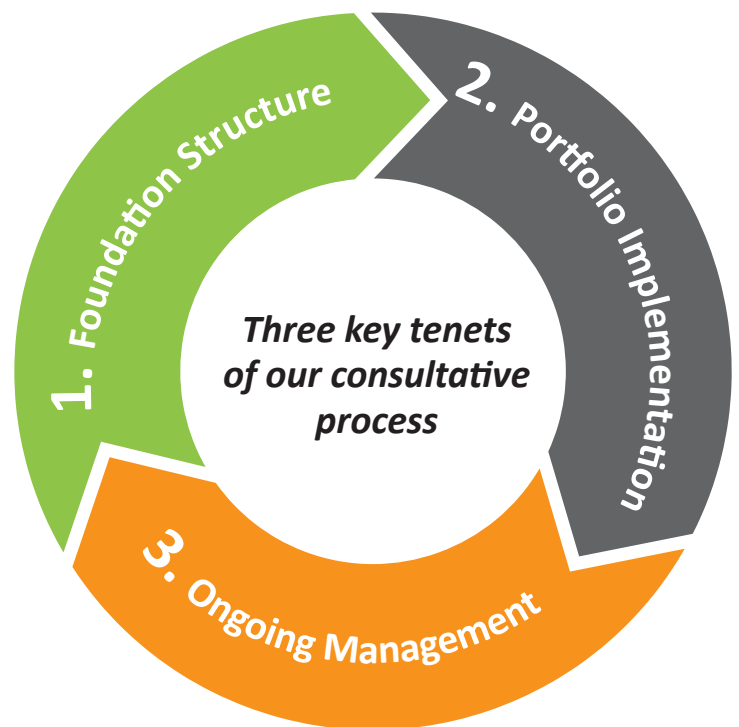
*A hands-on, mission-focused approach for today's charitable foundations.*

Foundations

At Oppenheimer & Co. Inc., we work tirelessly to understand the unique needs of our foundation clients in an effort to help them fulfill their missions and set shared expectations.

As trusted advisors, we work closely with foundations 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.

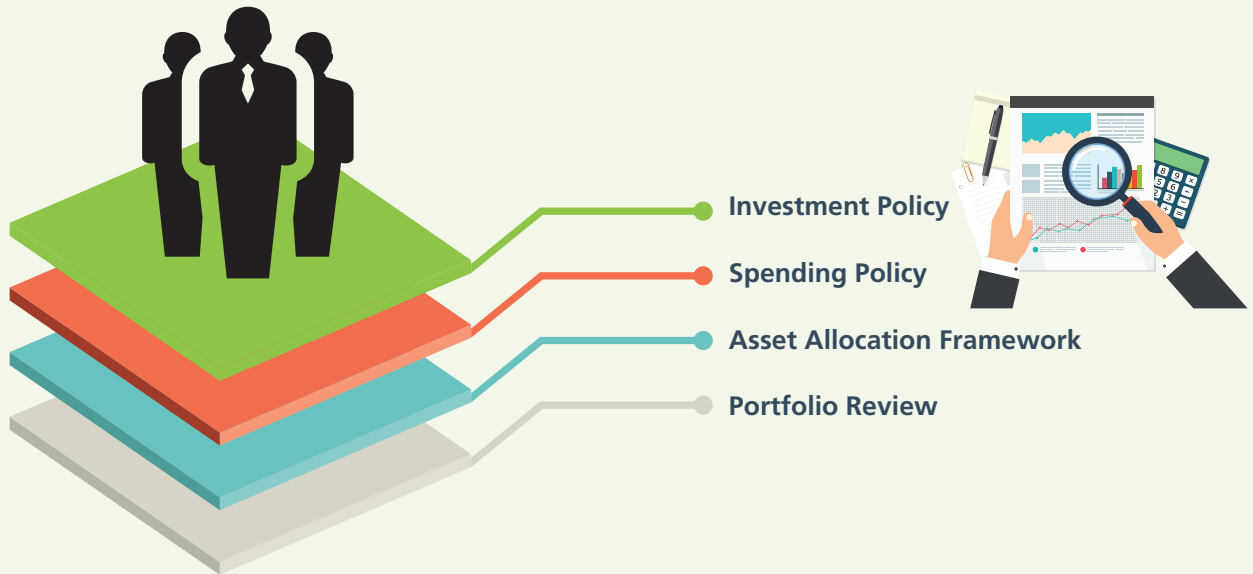
Today, meeting target returns has never been more important as foundations face increasingly complex capital markets, shifting regulatory winds and increased fiduciary responsibility. Whatever the challenge, we are here to support your needs as a trusted advisor.



# 1

## FOUNDATION STRUCTURE

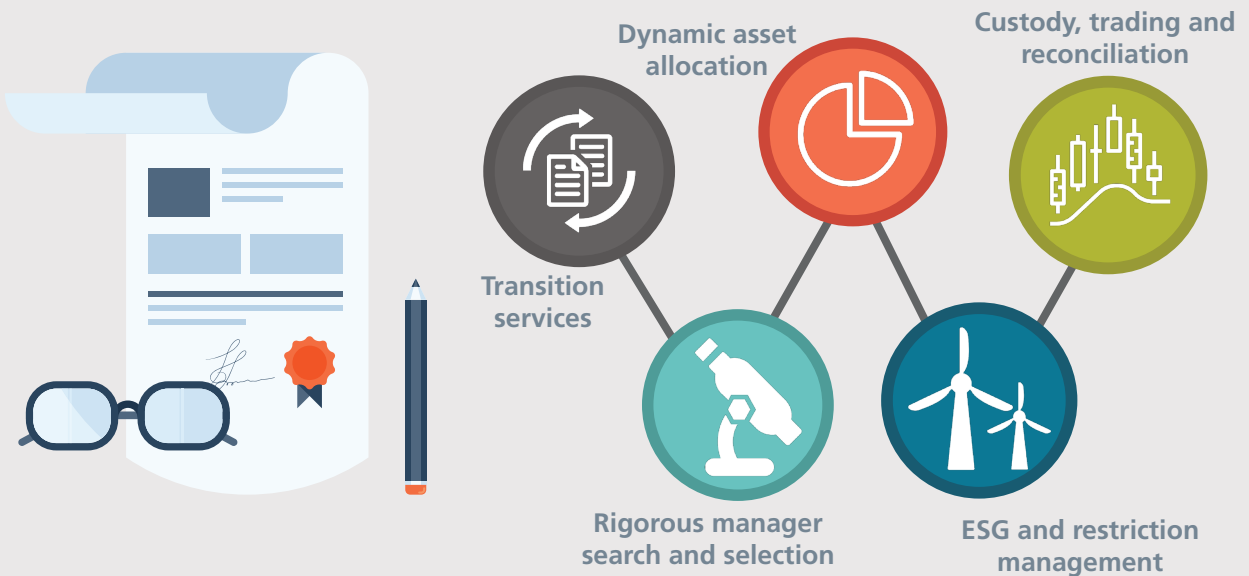
The ability to successfully manage a foundation starts with a solid structure. After gathering detailed insight into a foundation’s goals and objectives, we establish—or review and amend—the policies that help foster long-term success.



# 2

## PORTFOLIO IMPLEMENTATION

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



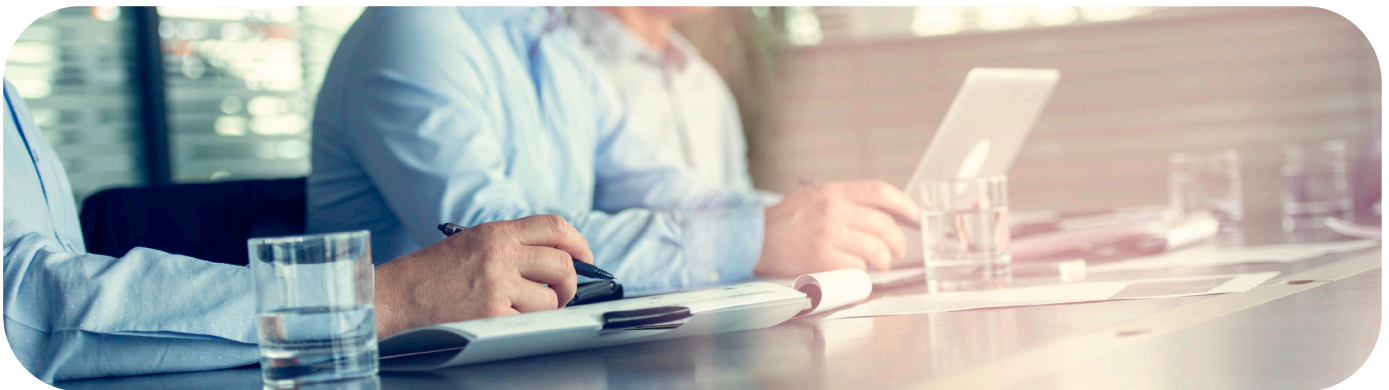
# 3 ONGOING MANAGEMENT

Consulting with our foundation 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 foundation's mission is our mission.



*For more information or to schedule a meeting,  
please contact an Oppenheimer & Co. Inc. financial professional.*

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