Litman Gregory
ASSET MANAGEMENT

Supporting Financial Success for Nonprofits

An Update on our Endowments & Foundations Group

Specialized Expertise

We are pleased to announce that Bill Thompson has joined the firm as a director of the Endowments & Foundations Group and Senior Advisor. In this role, Bill will work with our existing team to advise clients on strategic investment planning and portfolio construction, including asset allocation, manager selection, investment program evaluation, performance measurement, and governance.

Prior to Litman Gregory, Bill was a Managing Director at Cambridge Associates, a global institutional advisor, where he worked for more than 10 years as an Outsourced Chief Investment Officer for endowments, foundations, and family offices. Before joining Cambridge, Bill was an institutional credit specialist for Citigroup. He graduated from Denison University (BA) and the University of Chicago (MBA).

While Litman Gregory's core business is advising high-net-worth individuals and multigenerational families, we have been working with institutional clients for over 30 years, overseeing all aspects of their investment portfolios. Bill will draw on his institutional experience to advise Litman Gregory's endowment and foundation clients in fulfilling their organizations' missions through prudent management of their financial assets.

Our Services for Endowments & Foundations

As Fiduciary Partners, we do two complementary things. First, we oversee all aspects of the investment portfolio for endowments and foundations, acting as Outsourced Chief Investment Officer. Second, we provide continuous advice to board members on all the other issues that can impact a nonprofit's success, through what we call fiduciary planning.

OUTSOURCED CHIEF INVESTMENT OFFICER

Our disciplined investment process combines the objectivity of a consultant with the agility and accountability of a discretionary manager.

- Strategic asset allocation across 13 asset classes
- Tactical asset allocation to take advantage of "fat pitch" opportunities
- Active manager due diligence and selection
- Combination of passive investment strategies and select, high-conviction active managers
- ESG/SRI programs
- Private investments for larger portfolios

FIDUCIARY PLANNING

We act as the personal partners of board and investment-committee members and provide continuous guidance to an organization even as its member composition changes.

- Spending modeling and capital-sufficiency testing
- Board education
- Governance issues
- Nonprofit best practices
- Uniform Prudent Investor Act and other fiduciary requirements
- Investment Policy Statement

Our Team

Contact our team at **information@lgam.com** to learn more about how we can help your organization achieve its mission.

Craig Keller, CFA, MBA
SENIOR ADVISOR, PRINCIPAL

Bill Thompson, MBA
SENIOR ADVISOR

Lesley Cannan, CFP®
SENIOR ADVISOR