eCIO
The Chief Investment Officer for Nonprofits

series:

The Road to Nonprofit Investing

The Road Map to Starting an Enduring Investment Program

eCIO works exclusively with nonprofits to seamlessly coordinate the account opening and establishment of an investment program for nonprofits and their boards.

What to Expect When Opening an Investment Account

1. Hire eCIO as Your Fiduciary Investment Partner
2. Kick-Off Meeting With Your Authorized Signers
3. E-sign eCIO Investment Agreement & Schwab Paperwork
4. Transfer Funds to Schwab Account and Link Checking Account
5. Oversight Committee Takes Survey Providing Needs & Risk Input
6. eCIO Proposes Asset Allocation & Investment Policy Statement
7. Oversight Committee Approves Investment Policy Statement
8. eCIO Implements Portfolio & Provides Ongoing Management
9. Oversight Committee Joins Portal to Receive Fiduciary Reporting

eCIO works step-by-step with your organization to create a customized investment program so you can focus on accomplishing your mission.

Your Enduring Investment Program

eCIO: The Chief Investment Officer for Nonprofits

Nonprofits, Endowments, Foundations, and Religious Organizations select eCIO for our deep understanding of their unique investment needs.

The Investment Program Built for Nonprofits

Our experienced investment advisors manage customized investment programs for nonprofits.

Your enduring investment program is built on 3 pillars: Governance, Investments, and Communication.

Starting a New Investment Account?

Our advisory team partners with your organization every step of the way to set up an investment program designed for you.

Replacing a Board Managed Approach?

As a fiduciary dedicated to nonprofits, we partner with your oversight group to build a lasting investment program.

Switching Investment Advisors?

Our investment management process is designed specifically for nonprofits because those are the only clients we serve.

Join Nonprofits Across the Country

See why nonprofits are choosing eCIO over traditional investment advisors.

Schedule a 15-minute meeting with a member of our nonprofit investment advisor team.
www.getecio.com/meet/15-minute-conversation?utm_source=pdf-resource

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