

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



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 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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