

FIDUCIARY ASSESSMENTS FOR NONPROFITS



DOES YOUR NONPROFIT CONFORM TO THE GLOBAL FIDUCIARY STANDARD OF EXCELLENCE?

“For nonprofits, reputation...is everything.”¹

Are you doing all you can to protect and enhance your nonprofit’s reputation?

Boards of directors, entrusted with a nonprofit’s assets, have a fiduciary duty to ensure that a nonprofit’s assets are used according to donor intent and to support the nonprofit’s mission.

Enhance your nonprofit’s reputation and you enhance its value to donors and beneficiaries.

In a tighter charitable giving environment – transparency, good governance and fiduciary best practices assure and help retain donors, who see that you are committed to the donors’ cause.

They seek assurance about the quality of your governance, a prudent decision-making framework, and effective stewardship of donor gifts.

Let’s discuss how a CEFEX Fiduciary Assessment can help:

- Increase value from your service providers
- Reduce your personal and institutional liability
- Improve your financial results
- Mitigate your reputational risk
- Attract more donors and gifts to your nonprofit

To help you achieve your mission.

To learn more about how CEFEX can assess your nonprofit, visit cefex.org/steward, or contact Kathleen McBride, AIFA® 732-241-4988 or kmcbride@cefex.org



A CEFEX Fiduciary Assessment provides your nonprofit board and management with:

- **A detailed CEFEX Report** documenting the Analyst’s findings and evaluating your nonprofit’s conformance with the Global Fiduciary Standard of Excellence, as defined in the handbook, “Prudent Practices for Investment Stewards” from Fi360. Opportunities for Improvement and Nonconformities are identified, so you can address them.
- **An Fi360 Fiduciary Monitoring Report** that analyzes and rates the prudence of your investment portfolio in a variety of areas, including asset allocation, performance, style drift, and risk management.
- **An Fi360 Fee and Expense Report** with a clear summary of the fees your investment companies and advisors charge.
- A path toward achieving **CEFEX Certification, the gold standard of fiduciary excellence for nonprofits** and an exceptional way to publicly demonstrate that your nonprofit is worthy of donors’ trust and confidence.

¹“How Nonprofit Organizations Use Reputational Risk Management,” Sloan Review, MIT <https://sloanreview.mit.edu/article/how-nonprofit-organizations-use-reputational-risk-management/>