

HOW WE CAN SERVE YOU



PLAN

to help create financial confidence and peace of mind.

- Establish and review your organization's goals and objectives
- Develop or refine your investment policy statement
- Assess your organization's overall financial health and governance structure
- Cashflow review, analysis, and planning
- Evaluate your spending policy
- Review best and worst-case scenarios
- Coordinate with your other professional advisors



INVEST

to help grow your impact.

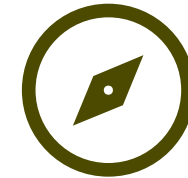
- Align your portfolio with your goals and objectives
- Determine asset allocation
- Select cost-efficient investment strategies
- Conduct due diligence and select investment managers
- Consideration of environmental, social, and governance (ESG) factors
- Utilize tax mitigation strategies for taxable entities
- Evaluate cash management solutions



MONITOR

to help ensure objectives are met and processes are followed.

- Monitor and rebalance your portfolio regularly
- Report on portfolio performance
- Periodic review of all investment-related expenses
- Assess progress toward your goals and objectives
- Review investment performance against benchmarks



GUIDE

you with care through opportunities and challenges.

- Provide fiduciary advice
- Conduct ongoing investment education
- Provide In-person or virtual meetings
- Facilitate gifts of stock and other securities
- Conduct educational sessions for new board or committee members

ADDITIONAL OFFERINGS

CoreWealth®
SignatureWealth®

SelectWealth™
Company Retirement Plans

Please Note: Foster Group does not serve as an attorney, accountant, or insurance agent. Foster Group does not prepare estate planning documents or tax returns, nor does it sell insurance products. Foster Group is not engaged in the practice of law or accounting. All investment strategies have the potential for profit or loss. Asset allocation and diversification do not ensure or guarantee better performance and cannot eliminate the risk of investment losses. PLEASE SEE IMPORTANT DISCLOSURE INFORMATION at www.fostergrp.com/disclosures. A copy of our written disclosure Brochure as set forth on Part 2A of Form ADV is available at www.fostergrp.com.