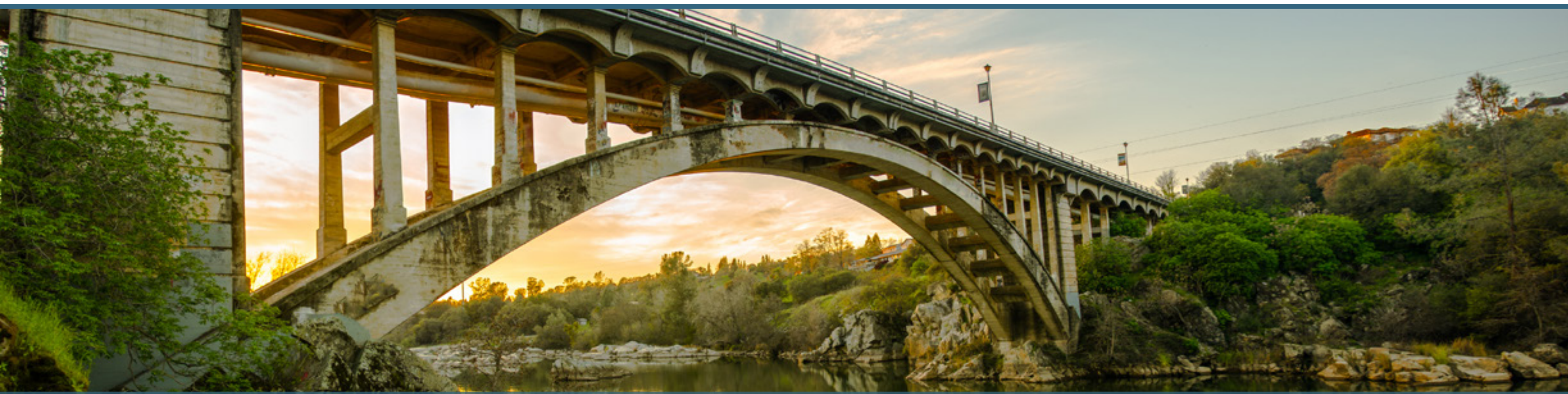
NATOMA WEALTH
POWERED BY HIGHTOWER



Institutional Consulting

Institutional investors ranging from endowments and foundations to pensions, insurers, governmental entities and corporations generally share the core goal of maximizing returns.

Our process involves learning about the institution in detail, including its goals and monetary needs. With this information and understanding, we refine the investment policy statements and spending policy accordingly. After we establish parameters, we can then adjust the portfolio, our expectations or spending policy accordingly. If the need to raise funds arises, we incorporate this need into our analysis and work with your goals and objectives.

INVESTMENT POLICY STATEMENT

We review client's current Investment Policy Statement (IPS) and when appropriate, work with organizations to develop an IPS that will serve as a roadmap for portfolio management and asset allocation strategies. We create custom, goals-based financial plans that focus on income generation, long term stability and tax-efficiency.

INVESTMENT MANAGEMENT

We work with clients and key individuals within the foundation to develop asset allocation strategies that align with the organization's values and IPS. Additionally, we provide ongoing asset allocation analysis, investment selection and performance measurement.

DISCRETIONARY PORTFOLIO MANAGEMENT

Our team oversees the day-to-day management and executional needs of investments and accounts, enabling clients to focus on running their foundations.

RISK MITIGATION ANALYSIS

Our team regularly assesses each client's portfolio, the markets and investments to discern and help mitigate risk.

NATOMAWEALTH.COM | (916) 287-0128 | 157 PARKSHORE DR, FOLSOM, CA