



INVESTMENT MANAGEMENT FOR NON-PROFITS, ENDOWMENTS, AND FOUNDATIONS

HELPING YOU ACHIEVE YOUR MISSION

You seek to responsibly preserve and grow the assets your organization has been entrusted with, and you know this requires expertise. You seek a fiduciary investment manager who understands the challenges faced by non-profits and recognizes the responsibility that comes with managing endowments and foundations.

Since 1995, SJS Investment Services has served as an investment advisor and co-fiduciary for non-profits, endowments, and foundations. We are here to support the people and board members responsible for leading those organizations.

SJS brings expertise, guidance, and solutions to help you manage your responsibilities, including investment policy development, benchmarking analysis, and investment management. We strive to ensure that your resources are enduring so that they allow you to serve the people and causes at the heart of your mission for generations to come.

COMMON QUESTIONS

- Who understands us and our mission?
- How do we protect organizational funds while supporting the mission and operations?
- What is a sustainable spending rate?
- Is our investment portfolio aligned with our mission?
- What are the fiduciary obligations of our board?
- How can our board monitor the success of the portfolio?

HOW WE HELP

Our goal is to help your organization make suitable financial decisions now and in the future. We can help you:

- Create sustainable planning and spending policies
- Build an investment portfolio aligning the fiduciary obligations of your board with the investing preferences of your stakeholders
- Prepare timely and clear reporting
- Effectively communicate strategies to donors and stakeholders

WHAT YOU RECEIVE

- Client-first philosophy that “You come first. All the time. Every time.” It isn’t just a slogan. It’s how we live our lives. It’s how we were raised. Our team provides major money center investment experience no matter where your organization operates or where it serves.
- As a Registered Investment Advisor (RIA), SJS is duty-bound to serve as a fiduciary, putting your interest first.
- The support of a team of professionals, with each team member applying their strengths to your situation.
- MarketPlus Investing®—our proprietary investment process, which incorporates academic advances in portfolio design with SJS’ 25-plus years of investment experience to help you achieve your goals through customized investment portfolios built with low costs and tax efficiency in mind.
- A secure and personal MySJS online portal with 24/7 access for tracking goals, account balances, investment progress, financial statements, and documents.

SERVICES

- Investment policy statement (IPS) review
- Asset allocation analysis
- Investment management
- Creation of and adherence to socially responsible investing guidelines
- Board and donor education
- Cash flow management
- Risk management

How Can We Help You?
Contact us to discuss your situation.

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