



**BERNSTEIN**

## FOUNDATION & INSTITUTIONAL ADVISORY SERVICES

### Your Partner in Mission

Join hundreds of purpose-driven organizations by partnering with Bernstein as your investment management and operations specialists. We collaborate with you to deliver a comprehensive and customized suite of services to meet your specific needs. Our partnership supports your fiduciary role, delivers investment results, measures performance with a transparent cost structure, and minimizes administrative burden. We are here so that you can focus on what's most important: Your Mission.

#### SERVICE OFFERINGS

##### POLICY AND GOVERNANCE

- Investment policy statement
- Asset allocation and risk analysis
- Gift acceptance policy
- Socially responsible investment guidelines
- Analyze spending policy

##### PORTFOLIO MANAGEMENT

- Comprehensive suite of low-cost beta to alternative portfolios
- Dynamic risk management
- Management of short and intermediate-term reserves
- Direct access to investment management teams and proprietary research
- 403(b) and Retirement Plan management and advice

##### OPERATIONAL SUPPORT

- Cash-flow monitoring and comprehensive reporting
- Monthly performance returns
- Website access
- Work directly with auditors
- Low-cost access to capital/line of credit

##### DEVELOPMENT SUPPORT

- Tailored educational programs
- Customized analysis
- Creative partnership opportunities
- Planned giving research









Email [FulfillingYourMission@bernstern.com](mailto:FulfillingYourMission@bernstern.com) to connect with our EFAS team and learn more about how we can support you in furthering your mission.

[info.Bernstein.com/Fulfilling-Your-Mission](http://info.Bernstein.com/Fulfilling-Your-Mission)

## A PARTNER WITH NONPROFITS OF ALL TYPES

We work with fiduciaries at a variety of organizations to develop a strategy that is structured for today's investment environment while remaining focused on the long-term mission.

Our thoughtful partners span a variety of focuses, including:

<p><b>Faith based</b></p> 	<p><b>Educational</b></p> 
<p><b>Governmental</b></p> 	<p><b>Environmental and animal</b></p> 
<p><b>Associations</b></p> 	<p><b>International</b></p> 
<p><b>Arts, culture, and humanities</b></p> 	<p><b>Healthcare and human services</b></p> 

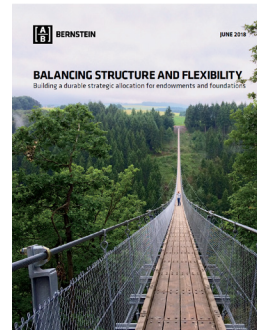
## THOUGHT LEADERSHIP

Bernstein is committed to being thought leaders and sharing our insights—timely [blogs](#), relevant [podcasts](#), and expert [research](#)—tailored to address the unique interests and challenges of our E&F clients.

### Podcasts






### Research



### Blogs

#### ENDOWMENTS & FOUNDATIONS

 <p><b>CAN ALTERNATIVE INVESTMENTS PROVIDE A BOOST FOR NONPROFITS?</b> by Clare Colla</p> <p>Over the last decade, investment policies reflected asset allocation rules written at a time when stock returns were strong, and volatility and inflation were unusually low. But geopolitical uncertainty and rising inflation can cause markets to become more volatile. And that means the asset allocations that worked well during the last decade probably won't produce the same results in the next one.</p> <p><a href="#">Alternative Asset Allocation, Endowments &amp; Foundations</a></p>	 <p><b>SEARCHING FOR FINANCIAL SUSTAINABILITY FOR FAITH-BASED NONPROFITS</b> by Clare Colla</p> <p>Despite differences in ideology, practice, location, and size, many religious organizations face the same challenges. Shifts in generational demographics, declines in religious affiliation, and changes to tax legislation are driving declines in giving. At the same time, these financial challenges are exacerbated by another issue: the cost to maintain (often aging) real estate holdings. These costs are increasing at a pace, in some cases, more rapid than revenue declines.</p> <p><a href="#">Endowments &amp; Foundations, Wealth Planning</a></p>	 <p><b>MISSION FIRST, PEOPLE ALWAYS</b> by Clare Colla</p> <p>While nonprofit leaders are working to secure long-term organizational financial stability, and in some cases, even providing financial literacy programs to the community, many employees who tirelessly serve their organizations' respective missions are falling behind on securing their own long-term financial well-being.</p> <p><a href="#">Endowments &amp; Foundations, Wealth Planning</a></p>
---	--	---

Bernstein does not provide tax, legal, or accounting advice. In considering this material, you should discuss your individual circumstances with professionals in those areas before making any decisions.

The [A/B] logo is a registered service mark of AllianceBernstein, and AllianceBernstein® is a registered service mark, used by permission of the owner, AllianceBernstein L.P., 1345 Avenue of the Americas, New York, NY 10105.

© 2022 AllianceBernstein L.P.

