

Prudent Practices for Investing Endowment Funds



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Salvatore's Conference Center

Riverwalk - Caesars Room

354 Merrimack Street, Lawrence, MA 01843

8:00 a.m. - Doors Open ~ 8:30 -10:30 a.m. - Speaking Program

While serving as a fiduciary to your non-profit organization, it is imperative to understand the best practices for investing an endowment fund. During this seminar, Jeffrey McDonald will discuss key components of investing and maintaining your endowment fund for the long-term. He will highlight diversification, performance benchmarks, asset preservation and selecting a suitable investment manager. Upon completion of this presentation, you will also understand the importance of developing an appropriate investment policy statement that will fit your organization's unique needs.

Enterprise Bank Non-Profit Collaborative Seminars are Free.

Buffet Breakfast provided.

To register or for more information, call Andrew Duncan
at 978-459-9000 ext. 4582 or Email: andrew.duncan@ebtc.com



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