Non-profits Microsite Wireframes

Tom Fisher | August 5, 2013

Target Audience:

Foundations, endowments & non-profits with $30m - $150m AUM searching for a smaller, regional, non-profit focused investment firm.

Audience Types:

Part-time investment staff

Less sophisticated investors who want access to sophisticated investment vehicles. May have 1 dedicated investment staff person, but likely that person is not full time investments

Investment committee

Investment committee is made up of volunteers, with a diversity of background. Used to working with a consultant or advisor.

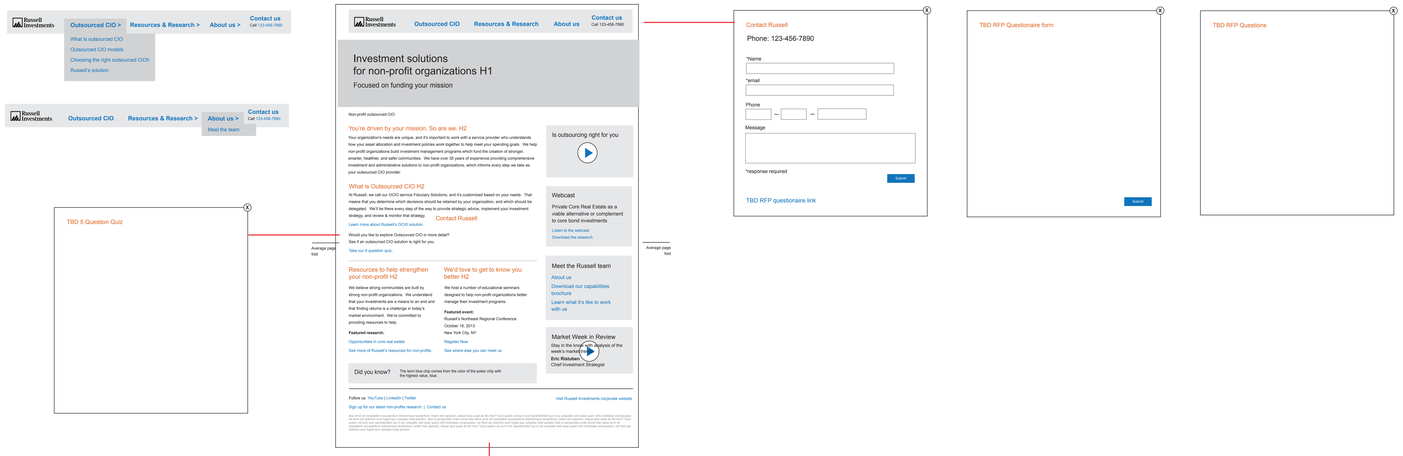
Conversion Goals:

What do we want them to do?

1. Contact Russell via Phone or email
2. Sign up to receive monthly newsletter
3. Attend a Russell webcast or event
4. Download Russell thought leadership content

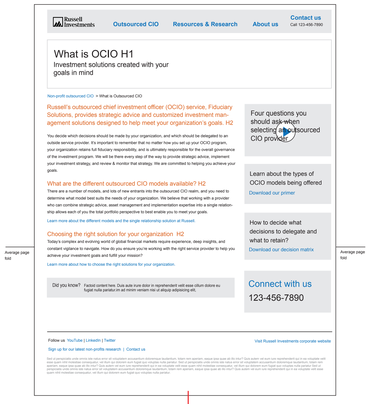
Outsourced CIO Home page

http://nonprofits.russell.com/outsourced-cio/default.page



What is outsourced CIO landing page

http://nonprofits.russell.com/outsourced-cio/what-is-outsourced-cio.page



Resources and research landing page

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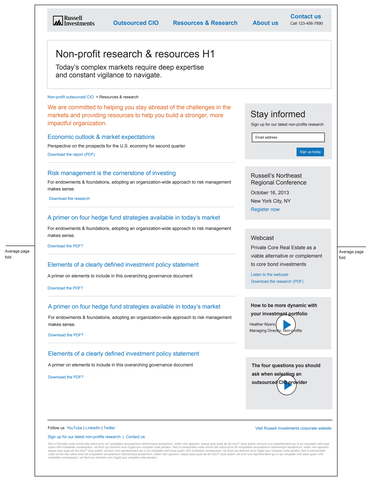

About us landing page

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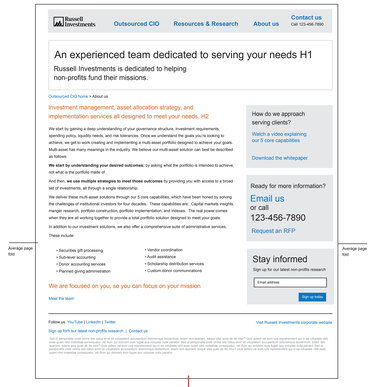

OCIO models detail page

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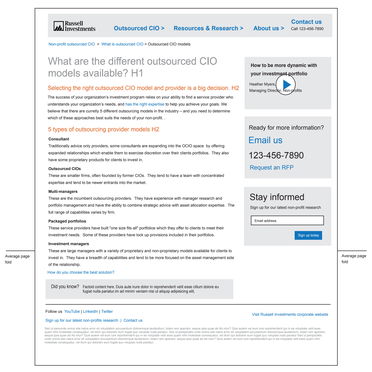

Choosing the right OCIO detail page

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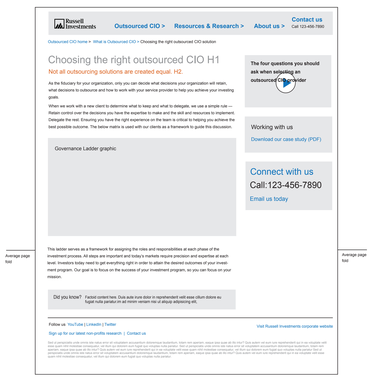

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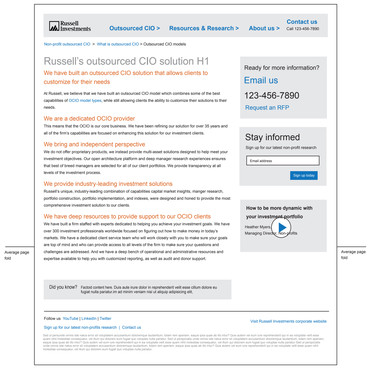

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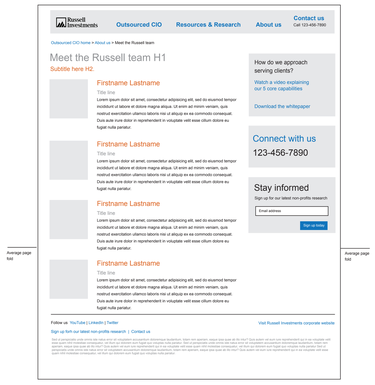

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Investment solutions for non-profit organizations H1

Focused on funding your mission

Non-profit outsourced CIO

You're driven by your mission. So are we. H2

Your organization's needs are unique, and it's important to work with a service provider who understands how your asset allocation and investment policies work together to help meet your spending goals. We help non-profit organizations build investment management programs which fund the creation of stronger, smarter, healthier, and safer communities. We have over 35 years of experience providing comprehensive investment and administrative solutions to non-profit organizations, which informs every step we take as your outsourced CIO provider.

What is Outsourced CIO H2

At Russell, we call our OCIO service Fiduciary Solutions, and it's customized based on your needs. That means that you determine which decisions should be retained by your organization, and which should be delegated. We'll be there every step of the way to provide strategic advice, implement your investment strategy, and review & monitor that strategy.

Learn more about Russell's OCIO solution.

Contact Russell

Would you like to explore Outsourced CIO in more detail?
See if an outsourced CIO solution is right for you.

Take our 5 question quiz.

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Resources to help strengthen your non-profit H2

We believe strong communities are built by strong non-profit organizations. We understand that your investments are a means to an end and that finding returns is a challenge in today's market environment. We're committed to providing resources to help.

Featured research:

Opportunities in core real estate

See more of Russell's resources for non-profits

We'd love to get to know you better H2

We host a number of educational seminars designed to help non-profit organizations better manage their investment programs.

Featured event:

Russell's Northeast Regional Conference
October 16, 2013
New York City, NY

Register Now

See where else you can meet us

Did you know?

The term blue chip comes from the color of the poker chip with the highest value, blue.

Is outsourcing right for you

Webcast

Private Core Real Estate as a viable alternative or complement to core bond investments

Listen to the webcast
Download the research

Meet the Russell team

About us

Download our capabilities brochure

Learn what it's like to work with us

Market Week in Review

Stay in the know with analysis of the week's market trends.

Eric Ristuben
Chief Investment Strategist

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What is OCIO H1

Investment solutions created with your goals in mind

Non-profit outsourced CIO > What is Outsourced CIO

Russell's outsourced chief investment officer (OCIO) service, Fiduciary Solutions, provides strategic advice and customized investment management solutions designed to help meet your organization's goals. H2

You decide which decisions should be made by your organization, and which should be delegated to an outside service provider. It's important to remember that no matter how you set up your OCIO program, your organization retains full fiduciary responsibility, and is ultimately responsible for the overall governance of the investment program. We will be there every step of the way to provide strategic advice, implement your investment strategy, and review & monitor that strategy. We are committed to helping you achieve your goals.

What are the different outsourced CIO models available? H2

There are a number of models, and lots of new entrants into the outsourced CIO realm, and you need to determine what model best suits the needs of your organization. We believe that working with a provider who can combine strategic advice, asset management and implementation expertise into a single relationship allows each of you the total portfolio perspective to best enable you to meet your goals.

Learn more about the different models and the single relationship solution at Russell.

Choosing the right solution for your organization H2

Today's complex and evolving world of global financial markets require experience, deep insights, and constant vigilance to navigate. How do you ensure you're working with the right service provider to help you achieve your investment goals and fulfill your mission?

Learn more about how to choose the right solutions for your organization.

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Four questions you should ask when selecting an outsourced CIO provider

Learn about the types of OCIO models being offered

Download our primer

How to decide what decisions to delegate and what to retain?

Download our decision matrix

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Non-profit outsourced CIO > What is outsourced CIO > Outsourced CIO models

What are the different outsourced CIO models available? H1

Selecting the right outsourced CIO model and provider is a big decision. H2

The success of your organization's investment program relies on your ability to find a service provider who understands your organization's needs, and has the right expertise to help you achieve your goals. We believe that there are curretly 5 different outsourcing models in the industry – and you need to determine which of these approaches best suits the needs of your non-profit. .

5 types of outsourcing provider models H2

Consultant

Traditionally advice only providers, some consultants are expanding into the OCIO space by offering expanded relationships which enable them to exercise discretion over their clients portfolios. They also have some proprietary products for clients to invest in.

Outsourced CIOs

These are smaller firms, often founded by former CIOs. They tend to have a team with concentrated expertise and tend to be newer entrants into the market.

Multi-managers

These are the incumbent outsourcing providers. They have experience with manager research and portfolio management and have the ability to combine strategic advice with asset allocation expertise. The full range of capabilities varies by firm.

Packaged portfolios

These service providers have built "one size fits all" portfolios which they offer to clients to meet their investment needs. Some of these providers have lock up provisions included in their portfolios.

Investment managers

These are large managers with a variety of proprietary and non-proprietary models available for clients to invest in. They have a breadth of capabilities and tend to be more focused on the asset management side of the relationship.

How do you choose the best solution?

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How to be more dynamic with your investment portfolio

Heather Myers,
Managing Director, Non-profits

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Outsourced CIO home > What is Outsourced CIO > Choosing the right outsourced CIO solution

Choosing the right outsourced CIO H1

Not all outsourcing solutions are created equal. H2.

As the fiduciary for your organization, only you can decide what decisions your organization will retain, what decisions to outsource and how to work with your service provider to help you achieve your investing goals.

When we work with a new client to determine what to keep and what to delegate, we use a simple rule — Retain control over the decisions you have the expertise to make and the skill and resources to implement. Delegate the rest. Ensuring you have the right experience on the team is critical to helping you achieve the best possible outcome. The below matrix is used with our clients as a framework to guide this discussion.

Governance Ladder graphic

This ladder serves as a framework for assigning the roles and responsibilities at each phase of the investment process. All steps are important and today's markets require precision and expertise at each level. Investors today need to get everything right in order to attain the desired outcomes of your investment program. Our goal is to focus on the success of your investment program, so you can focus on your mission.

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The four questions you should ask when selecting an outsourced CIO provider

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Non-profit research & resources H1

Today's complex markets require deep expertise and constant vigilance to navigate.

Non-profit outsourced CIO > Resources & research

We are committed to helping you stay abreast of the challenges in the markets and providing resources to help you build a stronger, more impactful organization.

Economic outlook & market expectations

Perspective on the prospects for the U.S. economy for second quarter

Download the report (PDF)

Risk management is the cornerstone of investing

For endowments & foundations, adopting an organization-wide approach to risk management makes sense.

Download the research

A primer on four hedge fund strategies available in today's market

For endowments & foundations, adopting an organization-wide approach to risk management makes sense.

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Elements of a clearly defined investment policy statement

A primer on elements to include in this overarching governance document

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Webcast

Private Core Real Estate as a viable alternative or complement to core bond investments

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How to be more dynamic with your investment portfolio

Heather Myers, Managing Director, Non-profits

The four questions you should ask when selecting an outsourced CIO provider

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An experienced team dedicated to serving your needs H1

Russell Investments is dedicated to helping non-profits fund their missions.

Outsourced CIO home > About us

Investment management, asset allocation strategy, and implementation services all designed to meet your needs. H2

We start by gaining a deep understanding of your governance structure, investment requirements, spending policy, liquidity needs, and risk tolerances. Once we understand the goals you're looking to achieve, we get to work creating and implementing a multi-asset portfolio designed to achieve your goals. Multi-asset has many meanings in the industry. We believe our multi-asset solution can best be described as follows:

We start by understanding your desired outcomes; by asking what the portfolio is intended to achieve, not what is the portfolio made of.

And then, **we use multiple strategies to meet those outcomes** by providing you with access to a broad set of investments, all through a single relationship.

We deliver these multi-asset solutions through our 5 core capabilities, which have been honed by solving the challenges of institutional investors for four decades. These capabilities are: Capital markets insights, manger research, portfolio construction, portfolio implementation, and indexes. The real power comes when they are all working together to provide a total portfolio solution designed to meet your goals.

In addition to our investment solutions, we also offer a comprehensive suite of administrative services.

These include:

- Securities gift processing
- Sub-level accounting
- Donor accounting services
- Planned giving administration
- Vendor coordination
- Audit assistance
- Scholarship distribution services
- Custom donor communications

We are focused on you, so you can focus on your mission

Meet the team

How do we approach serving clients?

Watch a video explaining our 5 core capabilities

Download the whitepaper

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Outsourced CIO home > About us > Meet the Russell team

Meet the Russell team H1

Subtitle here H2.

Firstname Lastname

Title line

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