

INVESTMENT POLICY STATEMENT FRAMEWORK

The framework below can assist you in developing a comprehensive Investment Policy Statement (IPS) tailored to your organization's needs. By creating a thoughtful and robust IPS, nonprofit organizations strengthen their investment governance, promote long-term financial sustainability and remain aligned with their mission. For additional guidance or resources, contact our expert team at 214.978.3300.

SECTION 1: MISSION & INVESTMENT PHILOSOPHY – *Defines the nonprofit's purpose and strategic objectives.*

SECTION 2: INVESTMENT OBJECTIVES – *Establishes specific financial goals and risk tolerance levels.*

SECTION 3: DISTRIBUTION POLICY – *Details guidelines for fund distributions to maintain financial stability.*

SECTION 4: ASSET ALLOCATION – *Outlines target asset mix and diversification strategy.*

SECTION 5: REBALANCING POLICY – *Provides guidelines for maintaining asset allocation over time.*

SECTION 6: RESPONSIBILITIES & ROLES – *Defines the roles of key stakeholders, including the investment committee, OCIO and other fiduciaries.*