

Project Title: Institutional Philanthropy	Date: 03/27/19
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Audio Script

On screen copy:
Institutional Philanthropy

Ann Limberg:
I'm Ann Limberg, and I lead a team of over 200 specialists across Bank of America who help non profits and institutions like yours maximize your philanthropic efforts.

On screen copy:
Ann Limberg
Head of Philanthropic & Family Office Solutions

Every organization is unique. You have your own risk tolerances, liquidity requirements, your own strategic goals and objectives, but at the end of the day, everyone is balancing a need for growth without taking on too much risk. Whether you're a faith-based organization, a healthcare or educational institution, we'll work with you in three primary ways.

On screen copy:
Manage Assets

First, we'll help you manage assets. We take the time to meet with key decision makers and to understand your goals and this is important because it provides us with a road map. We analyze your current investment portfolio, we apply our own market assumptions. We'll review your investment policy statement and spending policy, and together we can build sustainable returns over time that are delivered within the right risk framework for you.

On screen copy:
Analyze Portfolio

Market Assumptions
Review Policy
Build Returns
Risk Framework

This collaborative approach ensures that you feel fully in control of the process, and confident that we'll always act in your best interest.

On screen copy:
Consulting & Advisory

Our consulting and advisory specialists across the country bring a wealth of experience in all non-financial factors that can mean the difference between success or failure, and that includes things like board governance, leadership and board development, mission advancement, fiduciary review, and basic support for your ongoing efforts to be compliant and transparent.

On screen copy:
Fiduciary Experience

Our team has decades of fiduciary experience working with nonprofits, and they leverage their own work history and engagement with clients every day to deliver high quality best practices and strong relationship management. We're here to take the burden of administration off your shoulders and let you focus on your mission.

Navigating the complexities of institutional philanthropy is far from a one sized fits all proposition, that's why it's so important to work with a firm with ours who understands the dynamics of endowments, foundations and running a nonprofit. It's a great privilege for us to be in that conversation with you day in and day out.

On screen copy:
Bank of America logo

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