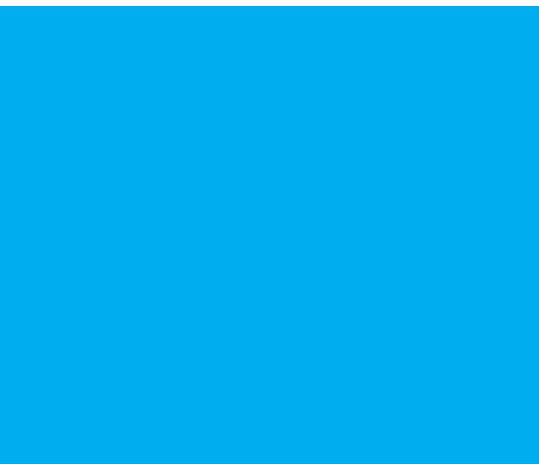


BENEFITS OF AN ADVISOR

Exclusively for Nonprofit Organizations



MEDIQUS
ASSET ADVISORS, INC.

"Results. One client at a time."®

WHAT COMES TO MIND

What comes to mind when you think about an “investment advisor” for your nonprofit organization? It likely relates to investment strategy. Equities versus fixed income? Mutual funds or exchange traded funds? Active or passive management? Asset classes? Or maybe the stereotyped “60/40 split”?

These questions all relate to how an investment advisor can enhance value for your organization, but to think of an investment advisor solely within this context would be an enormous mistake. **An investment advisor’s role should go beyond investments.** An investment advisor should provide value in additional areas for your organization such as governance, operations, and can even play a role in fundraising. For example:



GOVERNANCE

- Educating leadership of fiduciary best practices so they avoid legal liability related to their actions.
- Establishing appropriate investment and spending policies. These will provide continuity with an organization’s strategic plan and help **avoid unnecessary liability** related to the ongoing maintenance and spending of the organization’s assets.



OPERATIONS

- Assist with establishing accounts at a qualified custodian (paperwork, signatures, etc.), managing cash flows, and updating accounts for changes to leadership.

Regular monitoring of account transactions to identify potential issues.

- Keeping leadership informed with customized reporting and market commentary.
- Providing an organization’s accountant(s) and other advisors with information so auditing and reporting is promptly completed.



INVESTMENTS

- Determining appropriate balances, asset classes, fund selection as circumstances change. **This will help to eliminate the anxiety of “what should we do and when should we do it”** when market or economic conditions change.
- Relieving future leadership, who may have less financial experience, of the need to acquire additional knowledge outside of their area of expertise.



FUNDRAISING

- Facilitating different methods for fundraising so the organization can more effectively accomplish its mission. **For example, providing resources for receiving stock donations or information related to how other assets can be gifted to the organization.**

In short, the benefits of an investment advisor are so much more than just investments. **Perhaps you were not aware of all the areas where we can assist your organization.** If any of these areas are of additional interest to you or your organization, please let us know and we can provide more details for you. In addition, if you know of an organization that might benefit from these services, contact us now.

QUESTIONS? LET US HELP YOU. CONTACT US TODAY.

Matt Paprocki, JD, CFP® is Vice President of Institutional Services
and can be reached at 800-883-8555.

m.paprocki@mediqus.com

MEDIQUS Asset Advisors, Inc. Results. One Client at a Time.® | 200 North LaSalle Street, Suite 2300 Chicago, IL 60601

Phone: 312-419-3733 or 800-883-8555 Fax: 312-332-4908 | www.mediqus.com

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