

Foundations and Endowments



*Client First.
Every Opportunity.
Every Interaction.*

Your Balancing Act

Managing nonprofit assets requires the fine-tuned calibration of risk against desired returns, liquidity in light of spending needs, and fund perpetuation in the face of inflation. And all this, as you grapple with changing market forces and your own limited resources to get the job done.

For Those Counting on You, Count On Us

You're asked to balance today's needs against tomorrow's promises on behalf of others you've pledged to serve—students, people in need, local communities, and places of learning, healing, art, and inspiration. With so many beneficiaries counting on you, you can count on us.

Since 1993, Highland Consulting Associates has taken up the cause of our foundation and endowment clients as a co-fiduciary. We've aligned ourselves to serve you, while you and your nonprofit serve a greater good.

Your On-Staff, Off-Site Resource

We can partner with you in a fully outsourced investment management relationship (OCIO), or we can advise you in a more traditional consulting relationship—or virtually any arrangement in between.

Consider us an extension of your team. Highland can serve as an on-staff, off-site resource that lessens day-to-day stress and eases your longer-term concerns over your fiduciary duties, and the investment management policies and practices that will help your nonprofit keep its promises today and into the future.

Investor Advocates®

From day one, Highland has been hired for what we know and not what we sell. We describe that founding principle as “investor advocacy.”

As Investor Advocates, Highland ownership, operational and compensation structures align with our clients' best interests. We are not money managers and have no formal or informal ties to investment products or other service providers of any kind.

Client First. Every Opportunity. Every Interaction.



\$15+B in
Assets Under
Advisement¹



Advising
135 Clients¹



100% Employee
Owned to Serve
You with an
Owner's Attention



Fee-Only
Independence
and Unbiased
Advice Aligned
with Your Mission



Co-Fiduciaries
Since 1993



**A society grows great
when its people plant
trees under whose shade
they will never sit.**

Backstop Your Fiduciary Obligations

Let us help shoulder the burden of compliance. We can guide, educate, inform and ensure that you and your investment committee comply with the highest fiduciary standards. With quarterly in-person meetings and understandable reports, you can have confidence that your committee has all they need to fulfill their primary duty.

Broaden the Universe of Investment Choices

Our world-class, in-house research team has long-standing relationships with investment managers you may not have considered before. We can help open doors to options for constructing a one-of-a-kind portfolio best suited to your unique investment and spending policies.

Cultivate Your Donors' Trust

Doing everything right means hiring the right investment advisor—one reflecting your prudent management of assets entrusted to your care. Highland has staked our reputation on providing analytically sophisticated and completely impartial advice to our nonprofit clients. We pledge that caliber of stewardship to you and your donors.

Lessen Your Administrative Pressures

Be about the heart of your mission, and let us help with the implementation details that keep you from it. As a fully delegated partner, we can activate your investment strategies efficiently and cost-effectively. Your on-staff, off-site team is a phone call or email away.

In Mission with Nonprofits You Know



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1 – As of 12/31/19

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