

Foundations and Endowments



Highland

CONSULTING ASSOCIATES, INC.
Investor Advocates®

*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 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.

At Highland, our allegiance is to our clients.



One of the
Largest
Investment
Consultants
Worldwide¹



\$18B in
Assets Under
Advisement²



Advising
150 Clients²



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

As your co-fiduciary, we don't shy away from plan complexities. We can guide, educate, and inform you and your investment committee so that you comply with the highest fiduciary standards. With quarterly in-person meetings and understandable reports, you can have confidence that your committee has what they need to fulfill their primary duty.

Broaden the Universe of Investment Choices

Our credentialed, in-house research team has long-standing relationships with investment managers you may not have considered before, including access to alternative managers. We can help open doors to construct a one-of-a-kind portfolio at carefully negotiated fees to suit your investment and spending policies.

Support for Your Values

Highland is an employee-owned firm. We value diversity and diverse thinking on our teams and we are committed to owner-associate growth to better serve you. Highland will work with you to screen for investments that reflect your organization's objectives.

Further, we can guide your organization in the selection of managers and investments aligned to your interests. Highland can help you explore and implement investment strategies that demonstrate your active commitment to mission values while helping to achieve returns that amplify your impact.

In Mission with Organizations You Know

From hospitals and universities and their endowments, to community and private foundations, Highland offers impartial advice and client-first service to advance your goals. Our service and expertise has resulted in 98% client retention year-to-year.³ We invite you to hear more from our clients themselves. Let us put you in touch with organizations you'll recognize—organizations benefiting from Highland's promise to be: Client First. Every Opportunity. Every interaction.

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 impartial advice to our nonprofit clients. This stewardship includes our commitment to negotiate preferred fee structures with alternative pools and capacity-constrained asset managers.

Lessen Your Administrative Pressures

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

¹ –Highland Consulting Associates, Inc. is the 52nd largest investment consultant ranked by worldwide institutional assets under advisement as of 6/30/21 in Pensions & Investments 2021 Consultants Directory published by Crain Communications, Inc. on 2/1/22. There was no cost for inclusion in the rankings. A licensing fee of \$1,825 was paid for related logo use.

² – As of 12/31/21

³ – The average annual client retention rate beginning 1/1/2010 excluding any client relationship terminated due to dissolution, merger, or acquisition.

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