

How to Build a Financially Sustainable Organization for the Long Haul

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Budgets

- Wise Spending

Reserves

Good Record Keeping

- Projections

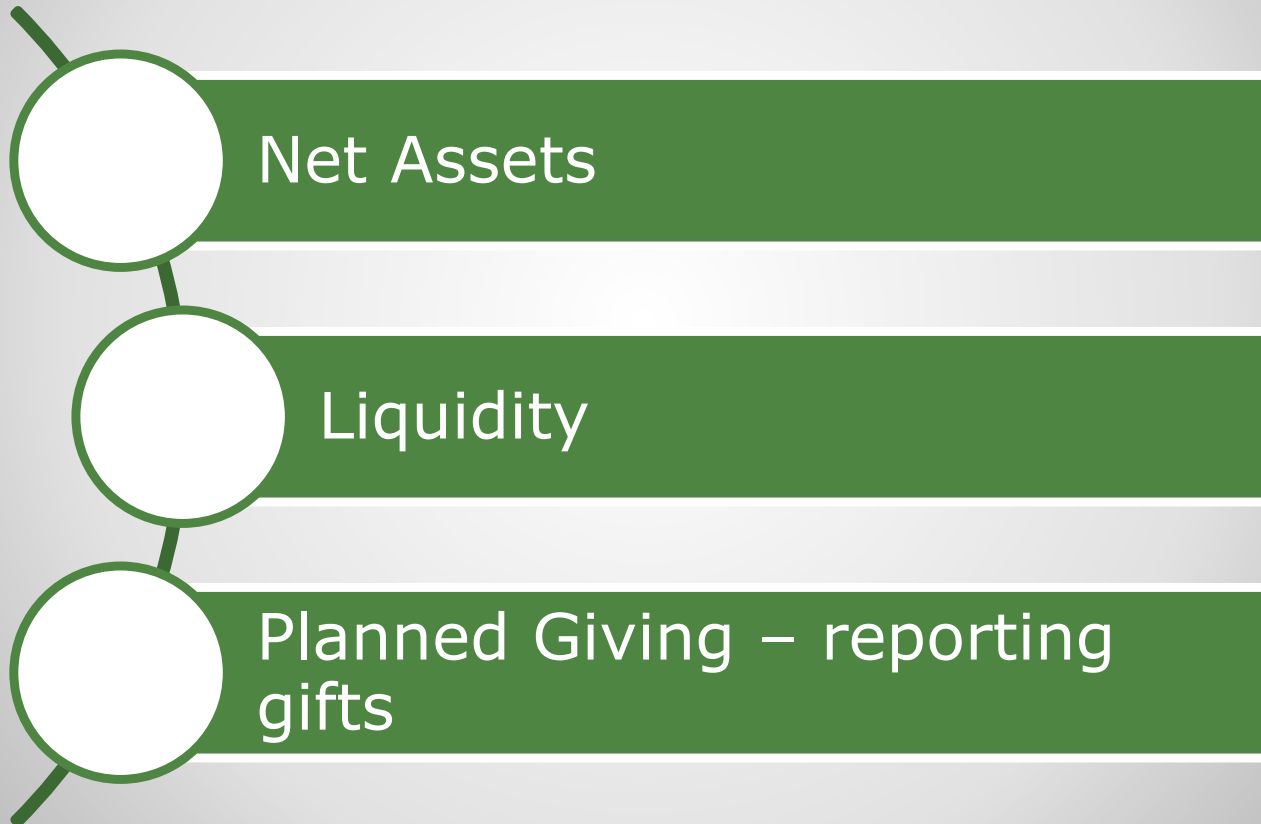
Investments



Picking Investment Firm

- Brokerage vs. Asset Management
- Issuing a Request for Proposal
- Location & Customization
- The Fee Question

Financial Statements



Audit / Review

What is the
difference

Picking an
Auditor

Investments

- Evaluating Investment Firm:
 - Results
 - Risk
 - Responsiveness

Minutes

- Understanding your risks and responsibilities
- What's enough, and what's too much?

Thank you!

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