

FOUNDATIONS AND ENDOWMENTS



EXPERIENCE WITH FOUNDATIONS AND ENDOWMENTS

Jumet Financial currently works with over a dozen foundations to manage more than 6 million in assets. We have over 25 years of charitable foundations and endowments experience. Our founder, Jan Jumet, also has first hand experience with running charitable foundations.

SERVICES WE OFFER

- Assisting with initial setup
- Guide through entity operation
- Communicate, manage, and process securities gifts
- Cash flow managing and disbursement processing
- Assist in the developing of the investment policy statement
- Ongoing consulting services
- Periodic reviewing of operations and performance

INDEPENDENT ASSET MANAGEMENT

Jumet Financial prides itself on its commitment to independent financial advice, as we are not affiliated with any specific product or investment vehicle. This allows us to tailor your foundation's portfolio to its unique financial objectives.

INVESTMENT PHILOSOPHY

- At Jumet Financial, we believe that a well-designed portfolio should seek a balance between principal protection and growth.
- We consider factors such as:
 - Cash flow needs
 - Asset levels
 - Annual donations
 - Other relevant variables to the entity
- We don't believe in timing the market or single security selection but instead focus on mitigating risk through diversification.

www.jumetfinancial.com

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