

NONPROFIT INVESTMENT SERVICES



WHO WE ARE

Jumet Financial is headquartered right here in Beaver County, where we've built our practice around one core belief: every client, family, and organization is different, and no one fits a cookie-cutter plan. We take a holistic approach to planning, gathering a full picture of your goals before building a strategy tailored specifically to you. For a foundation, that means understanding your mission and your board's needs before we ever talk about a portfolio. Today, we work with over 20 foundations and endowments, local and nationally.

WHY WORK WITH US?

LOCAL, NOT A CALL CENTER

When you work with Jumet Financial, you're working with neighbors who understand Beaver County's schools, families, and needs firsthand.

FOUNDATION & NONPROFIT EXPERIENCE

We understand the dynamic responsibilities that come with managing charitable assets. Our team has worked directly with:

- Foundation formation, governance, cash management, investment management, recordkeeping and tax matters, board reporting, and board consultation — including numerous foundations in Beaver County and foundations/endowments nationally.
- Municipal and institutional cash flow management, including municipalities in Beaver County.

HOW WE CAN HELP YOUR FOUNDATION

- Ensure investment management is aligned with your mission and spending policy
- Manage cash flow planning to meet ongoing grant and operating needs
- Consult with the Board and Foundation members, and on board-ready reporting
- A responsive, in-person local point of contact

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