



## Investment Options: Finding the Right Fit

By Royal Wealth Management

There are many options for investing your organization's assets. The right approach depends on your asset size, staff capacity, board expertise, and requires knowing your organization's unique goals and specific needs. Finding the right fit is most important.

- 1 Do It Yourself**  
Board or Committee defines asset allocation, selects investments, monitors performance.
  - Do it yourself might make sense for very small nonprofits and pools of capital but *not* recommended as best practice.

- 2 Outsource: Non-discretionary**  
Hire investment advisor or consultant to recommend strategy and investments.

- 3 Outsource: Discretionary**  
Hire investment advisor to manage portfolio and transact within portfolio on your behalf.



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[Royal Wealth Management](#) is a full service independent wealth management firm, serving institutions and individuals in all of their investment management and financial planning needs. We help nonprofit organizations become more sustainable and work toward their mission through time-tested investment strategies.

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