

## HELPING NONPROFITS SO THEY CAN HELP OTHERS

You're working to advance your cause and help the community – your job isn't to manage investments. **BLUEFIN INVESTMENT MANAGEMENT** can help.

Prudent nonprofits know that investing is beneficial to their organization, but it can present new challenges they may not be prepared for. Bluefin Investments provides a range of solutions to help, ranging from consulting and advisory to a fully outsourced chief investment officer.

### CONSULTING & ADVISORY

A CONSULTING OR ADVISORY RELATIONSHIP IS BEST SUITED FOR THOSE WHO WISH TO KEEP A DEGREE OF CONTROL AND REMAIN ACTIVELY INVOLVED IN THE INVESTMENT PROCESS.

#### BLUEFIN SERVICES INCLUDE:

- Investment Policy Statement development and review
- Asset allocation analysis and guidance
- Performance monitoring and reporting
- Investment manager searches and communication
- Negotiation of fees on your behalf
- Ongoing portfolio review

### OUTSOURCED CIO (OCIO)

OUTSOURCING THE ROLE OF CHIEF INVESTMENT OFFICER WORKS BEST FOR THOSE WHO WISH TO BE INVOLVED IN POLICY DECISIONS, BUT OUTSOURCE THE DAY-TO-DAY RESPONSIBILITIES.

#### BLUEFIN SERVICES INCLUDE:

- Investment Policy Statement development and review
- Strategic asset allocation and portfolio management
- In-house management of portfolio
- Immediate portfolio repositioning based on market conditions
- No fee if the account is lower on the month
- Additional investment manager selection and implementation
- Assumption of fiduciary responsibility

Founded in 2009, Bluefin Investment Management has a proud history of serving the institutional investment community. Bluefin Investments is entirely independent, not affiliated with a bank or other institution so there are no conflicts of interest. The focus is solely on growing your portfolio.

Bluefin Investments provides the solutions to help your organization achieve its goals. Visit [www.bluefininvest.com](http://www.bluefininvest.com) for more details or call us directly at 904-834-3309.

Past performance is no guarantee of future results. This brochure is provided by Bluefin Investment Management, LLC for informational purposes only. Nothing herein constitutes investment, legal, accounting, or any trading strategy. This brochure may include or imply estimates, outlooks, projections and other "forward-looking statements." No assurance can be given that future results described or implied by any forward looking information will be achieved. Investing entails risks, including possible loss of principal.