



OUTSOURCED CHIEF INVESTMENT OFFICER (OCIO)

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

Why use an OCIO?

An OCIO improves your investment program by delegating some day-to-day management responsibilities and providing oversight of your investment program.

- ✓ Assume fiduciary responsibilities
- ✓ Investment policy creation and support
- ✓ Determine asset allocation strategy
- ✓ Professional portfolio management
- ✓ Manage risk levels
- ✓ Report on performance
- ✓ Investment manager due diligence
- ✓ Allow you to focus on your mission

Prudent nonprofits know that investing is beneficial to their organization, but it can present new challenges they may not be prepared for. Outsourcing the role of Chief Investment Officer to Bluefin Investments allows you to focus on your mission while letting our expertise handle your investments.

INVESTMENT OUTSOURCING IS GROWING RAPIDLY

More and more organizations have made the decision to delegate some or all of their investment and operational responsibilities to a third party investment manager. The reduced administrative burden combined with increased oversight and immediate portfolio responsiveness is an attractive option for organizations.

DISCRETIONARY OCIO GROWTH

ASSETS IN \$MILLIONS



Source: ai-CIO.com | Feb 2017

50% of nonprofit organizations with under \$500 million in assets use the services of an OCIO.

-2016 NACUBO-Commonfund Study of Endowments

A CUSTOM OCIO SOLUTION

Every organization is different – different objectives, different organizational structures, and different needs. And it's up to each organization how much discretion they wish to delegate. Bluefin Investments creates a custom investment program tailored to accommodate various discretion levels.

RETAIN CONTROL

Delegation does not mean you lose control. Clients can remain as involved as they wish and still establish their policy, develop an asset allocation strategy, and set limits on oversight - all while freeing valuable time to focus on achieving long-term organizational objectives.

At Bluefin, nonprofits pay no fee if the account value is lower on the month.

Bluefin Investments provides the solutions to allow your organization to achieve its goals and focus on its mission. Visit www.bluefininvest.com for more details or call us directly at 904-834-3309.

Founded in 2009, Bluefin Investments helps many nonprofits with their investment programs. We take the time to understand your organization and are invested in your success.

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



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