RELEVANT WEALTH

Helping You Steward Your Foundation's Future

Chief Investment Officer Services for Private Foundations



Independent | Institutional | Collaborative



Bruce Raabe, CEO
Relevant Wealth
Mill Valley, California

Every foundation has a story, a purpose, and a legacy worth protecting.

Why this work matters

A letter from Bruce

For more than three decades, we've had the privilege of helping families and foundations make thoughtful decisions about the wealth they've worked so hard to build.

What continues to inspire me is the purpose behind that wealth, particularly with private foundations. Foundation assets represent values, generosity, and a vision for making a difference that can extend across generations. That responsibility matters deeply to us.

At Relevant Wealth, we bring seasoned investment expertise together with a deeply personal approach. Our team works alongside foundation boards and their advisers to build bespoke investment programs aligned with each foundation's goals.

We believe great work starts with relationships, and that's what makes our experience even better. We make sure to take the time to listen and understand what matters to you. And as a fiduciary, we are committed to putting your foundation's interests first in every decision we make.

Even after three decades, I remain passionate about this work, because every foundation has a story, a purpose, and a legacy worth protecting. We're here to help you steward that legacy and give it the opportunity to endure and make a difference.

Please call me directly to learn more.

Bruce Raabe, CEO
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Our “even better” experience

What working with us looks like

Our six-step approach reflects decades of experience and industry best practices. It starts with listening and stays focused on your foundation from first meeting to ongoing oversight.

1 Discover

Complimentary and confidential

It all starts with listening to learn your history, culture, mission, priorities, spending needs, and governance.

2 Investment Stress Test

Complimentary and confidential

A review of your current investment approach identifies gaps, risks, and opportunities for improvement.

3 Education

Hands-on guidance helps your board develop or refine your Investment Policy Statement (IPS), and we provide ongoing education on investment matters.

4 Design

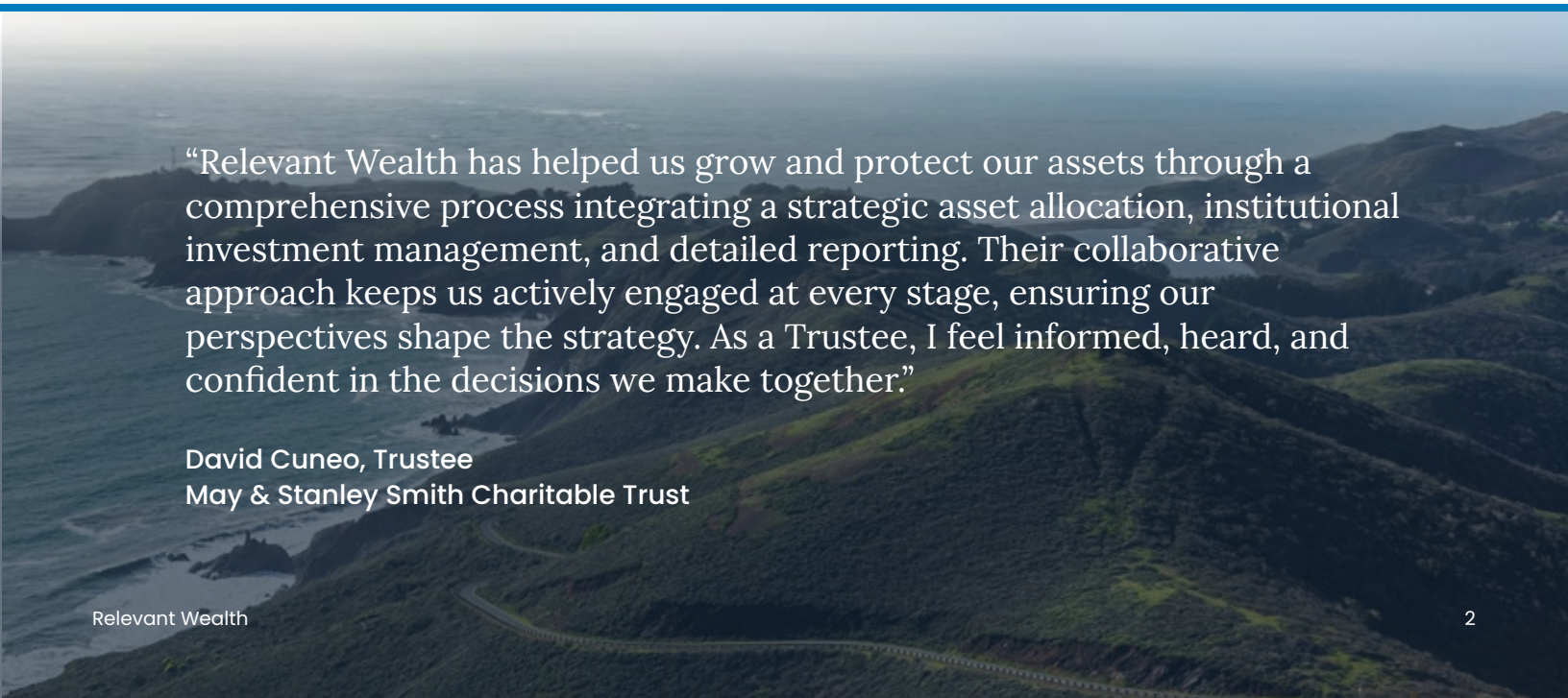
After deciding on the strategic asset allocation together, we select investments aligned with your IPS.

5 Implement

Your portfolio is put into action, and we handle the ongoing administrative details so your board doesn’t have to.

6 Monitor & Evolve

Ongoing oversight, performance benchmarking, and regular board meetings keep your portfolio aligned as your foundation and the markets change.



“Relevant Wealth has helped us grow and protect our assets through a comprehensive process integrating a strategic asset allocation, institutional investment management, and detailed reporting. Their collaborative approach keeps us actively engaged at every stage, ensuring our perspectives shape the strategy. As a Trustee, I feel informed, heard, and confident in the decisions we make together.”

David Cuneo, Trustee
May & Stanley Smith Charitable Trust

An extension of your foundation team

Your foundation's Chief Investment Officer

Foundation boards carry real responsibility. Trustees are often volunteers or family members who oversee assets meant to serve a mission for generations. We help by serving as your Chief Investment Officer (CIO), with the leadership and expertise of an institutional investment office, such that your foundation need not build one internally. Working as an extension of your foundation's team, we build a close, personal relationship that keeps your goals at the center of every decision.

How we support your foundation

Investment Policy
Develop, review, and update the Investment Policy Statement (IPS).

Asset Allocation
Determine the right mix of asset classes.

Investment Strategy
Align risk, return, and liquidity with your foundation's long-term goals.

Investment Selection
Research, evaluate, and select investments.

Portfolio Oversight
Monitor performance, risk, diversification, liquidity, and markets.

Reporting & Meetings
Provide regular reporting and lead investment committee reviews.

Board Engagement
Educate board members and provide perspective for informed governance.

Coordination
Work with your CPA, attorneys, administrators, and other partners.

Fiduciary responsibility

We put your foundation's interests first, and we take that responsibility seriously.

A different kind of partner

How working with us compares to a larger institution

Relevant Wealth is designed to provide a distinctive service: focused foundation expertise, direct leadership access, and a highly customized experience. Here's how our approach compares with what foundations often experience at larger institutions.

What Matters	The Relevant Wealth Experience	Common Obstacles
Leadership access	Direct access to senior leadership	Layers between you and decision-makers
Foundation expertise	Deep understanding of philanthropic strategies	Generalist teams serving many client types
Independence	Independently owned and relationship-based	May favor their own products or platforms
Portfolio design	Built from your IPS, objectives, spending, and liquidity needs	Standardized models applied across clients
Responsiveness	A focused team that responds quickly	More handoffs and slower decisions
Continuity	A long-term partnership that spans decades	Frequent adviser and coverage changes

Focused by design

We keep our client base focused, so we know every foundation we serve, and the people behind it.

Your portfolio, built around your goals

What goes into your portfolio, and why

Your Investment Policy Statement guides every decision: which asset classes we use, and how we combine them around your time horizon, spending needs, and risk tolerance. The result is a diversified portfolio built to sustain your foundation's giving for years to come.

Asset Classes We Build With

Equities

Higher long-term growth potential and the opportunity to outpace inflation across U.S. and international markets.

Fixed income

Income and stability that can help reduce overall portfolio volatility.

Alternatives

Non-traditional strategies used to enhance return potential and manage risk.

Cash

Available to help meet your foundation's regular spending needs.



How We Manage Your Portfolio

Time horizon

Managed with a long-term view, matched to your foundation's time horizon.

Liquidity needs

Structured around your foundation's spending needs to support a stable annual payout.

Risk management

Broad diversification and a disciplined, long-term approach designed to help manage risk.

Reporting

An institutional portfolio management system offering real-time online and mobile access to your portfolio.



"Relevant Wealth's thoughtful guidance and independent perspective give our Board greater confidence in making informed decisions and fulfilling our responsibility as stewards of our foundation's assets."

Thomas Kissinger, Treasurer
Kissinger Family Foundation

Why Relevant Wealth?

What you can expect from us

Choosing a CIO partner is one of the most important decisions a foundation board makes. We answer only to you, a principle that shapes everything from our advice to the way we're structured.

Dedicated team

Our experienced investment professionals focus on your foundation. You have direct access to your CIO with no layers in between.

Fiduciary partner

As a fiduciary, we are committed to acting in your foundation's best interests. That means clear disclosure and recommendations made only for your benefit.

Independent firm

We are independently owned, with no parent company or outside shareholders, so our advice is shaped by your foundation's needs.

Statement provided by a current client of Relevant Wealth. No compensation was provided for this testimonial, and there are no material conflicts of interest.

RELEVANT WEALTH

Helping you steward your legacy.

Are you certain there are no gaps in your current investment approach? Reach out to our team and schedule your complimentary, confidential investment stress test to find out.

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RelevantWealth.com

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