SOUND MANAGEMENT
OF INSTITUTIONAL PORTFOLIOS

ML&R WEALTH MANAGEMENT is an independent Registered Investment Advisor dedicated to helping clients achieve their financial goals through a well thought out wealth management plan.

Our institutional services include getting to know you and your organization. We will work closely with your executive director and staff, as well as the board of directors. Our goal is to ensure that your portfolio is managed in accordance with your organizational objectives, including socially responsible and sustainable investment funds, as desired. We also provide fiduciary training for board members so that they understand their role in investment decisions and oversight.

We provide investment advisory and management services to match your organization's mission and to help advance your long-term goals.

Our services for non-profit organizations include:

- ✓ **Spending Policy Analysis**
- ✓ **Social and Sustainable Investing**
- ✓ **Fiduciary Training for Board Members**
- ✓ **Custom Bond Portfolios**
- ✓ **Charitable Giving: Gifted Stock**

At **no cost or obligation**, we would be happy to discuss your goals with you and provide you a **second opinion** on your personal financial strategy.

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