



Friday, May 19, 2023

Advisor RFPs for Endowments and Foundations: A Step-by-Step Guide (Webinar Recording)

Nonprofits need partners to help them meet their investment, spending, governance, and fundraising challenges. However, finding that partner via an advisor RFP can be daunting. Having helped create the industry-standard response template for advisor requests for proposals (RFPs), CAPTRUST is positioned to present a step-by-step RFP process for nonprofits. Watch our webinar recording to learn more.

The need for philanthropic resources is highest during periods of market stress. Nonprofits need partners with deep expertise, access to market intelligence, and aligned interests to help them meet their investment, spending, governance, and fundraising challenges. However, finding that partner via an advisor request for proposal (RFP) can be daunting.

Having responded to more than 3,000 RFPs and helped in the creation of the industry-standard RFP response template, CAPTRUST can help you optimize the RFP process from beginning to end. In this webinar recording, we present a step-by-step guide to aid you in planning, preparing, and executing on this important body of work. This panel discussion between Marketing Manager Rebecca Hughes, Marketing Manager Megan Cutter, and Vice President, Financial Advisor [Will Chitwood](#) also covers:

- The investment questions that actually matter
- How the RFP process has shifted for nonprofits in recent years
- Recent technologies that have improved the RFP process

To download a copy of the transcript, [click here](#).

Additional Resources

[April 2023 Market Update](#)

[Exploring CAPTRUST's 2022 Endowment & Foundation Survey Results \(Webinar Recording\)](#)

[Sample Endowment and Foundation Dashboard](#)

[Sample Endowment and Foundation RFP Template](#)

[Sample Endowment and Foundation Investment Policy Statement Non-Discretionary](#)

[Sample Endowment and Foundation Investment Policy Statement OCIO](#)

Author(s)



Will Chitwood

<https://www.captrust.com/people/will-chitwood/>

Legal Notice

This document is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2023 CAPTRUST Financial Advisors