



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

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](#)

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