



Request for proposal

Effective Advisor RFPs for Nonprofits (Webinar Registration Link)

Drawing on experience from more than 600 completed requests for proposals (RFPs), CAPTRUST will share a modern, practical approach to help endowments and foundations run an effective search process from start to finish.

When? Wednesday, July 22, 4 -5 p.m.

To register for this webinar, [click here](#).

In this session, Financial Advisor [James Ross](#) and Senior Director of Marketing [Greg Middleton](#) will share recent trends in advisor searches and what they mean for nonprofits, including:

- Common pitfalls endowment and foundation leaders face during the RFP process
- Best practices for evaluating proposals with clarity and confidence
- Key nonprofit considerations, including governance, board involvement, and mission alignment

Attendees will leave with actionable guidance to streamline the process and select an advisor aligned with their organization's long-term goals.

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