



## Syntrinsic

### Endowment Fundamentals

Who: Heads of School, Development Officers, Board Chairs, Business Managers

When: Wednesday, November 13<sup>th</sup>, 2024 from 10:00 to 11:00 a.m.

Where: Virtual on Zoom

#### Session Description:

- The Case for Endowment
  - Funding
  - Sustainability
- Managing the Endowment
  - Stewardship
  - Governance
  - Fiduciary Responsibility
- Investing the Endowment
  - Investment Policy
  - Portfolio Construction
- Distributing from the Endowment
  - Spending Policy
  - Volatility

#### Bio:

##### **Jim Brauer, CIMA®, CFP®**

Managing Director



As Managing Director, Jim Brauer serves on Syntrinsic's Investment Committee and leads the firm's Investor Relations efforts. He also works closely with Syntrinsic's clients, which include community and private foundations, public charities and other philanthropic entities and families, providing investment advice and strategic guidance to support their missions.

Jim joined Syntrinsic after almost 20 years at TIAA Financial Services where he served as Regional Director of Endowment and Philanthropic Services in TIAA's Outsourced Chief Investment Office (OCIO) division.

Additional experience includes roles in sales leadership, investment management, retirement planning, and relationship management within the Wealth Management and Consumer Banking divisions.

His expertise in financial and philanthropic services, coupled with his engagement in the community and commitment to educating and empowering clients, attracted him to join the Syntrinsic team.

Active in the community, Jim serves as chair of the Board of Directors for the Aurora Public Schools Foundation, is a 2022 graduate of the Denver Metro Chamber of Commerce Leadership Denver Program, has served as a mentor with City Year Denver, served on Mile High United Way's Finance and Investment Committee, and is a 2016 of the Downtown Denver Partnership Leadership Program.

Originally from Arkansas, Jim earned a bachelor's degree in business administration from Harding University and moved to Colorado shortly after. He has earned several industry licenses and designations over the years, including his FINRA Series 7, 24, and 66, as well as his Certified Financial Planner (CFP®) and Certified Investment Management Analyst (CIMA®) certifications.

- **Free for those schools who purchased a speaker series subscription.**
- **\$50 per attendee for those schools who have chosen "A la Carte". You may pay by credit card when you register.**