



## Syntrinsic

### **Endowment 3.0: Modifying Spending Schedules and Advanced Investment Strategies**

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

When: Wednesday, January 22nd, 2025 from 10:00 to 11:00 a.m.

Where: Virtual on Zoom

#### **Session Description:**

This webinar is designed for schools with existing endowments of \$9 million or more. It will offer thoughts and strategies to leverage current investments and spending policies to maximize future growth, smooth distributions in periods of positive and negative returns, assess acceptable levels of risk, and ensure the endowment is adequately supporting the school's mission.

Specific Endowments 3.0: Advanced Topics will include:

- Monte Carlo Analysis
- Spending Policies
- Private Asset Planning

#### **Bios:**

##### **Ben Valore-Caplan**

Founder and Co-President



Throughout his career, Ben has built bridges between seemingly disparate groups. Since 2000, he has connected the nonprofit and finance sectors as an investment advisor and strategic partner to foundations, endowments, nonprofit organizations, and the people affiliated with them.

Ben founded Syntrinsic Investment Counsel in 2008 after serving as Senior Vice President of Investments at UBS where he led the BVC Institutional Consulting Group. In 2023, Syntrinsic joined IMA Financial Group to gain efficiency and deepen impact across the country. At Syntrinsic, Ben serves as Co-President where he runs point on several client relationships and co-leads the firm's long-term strategy.

Ben also builds bridges through community engagement. In his first career, he was an educator and social entrepreneur. He founded and directed Denver Summerbridge, an academically rigorous educational opportunity program for first generation college bound students that continues to thrive over 30 years later as Breakthrough Kent Denver.

Ben served as an independent trustee, investment committee member, and Vice Chair for Colorado's \$50+ billion Public Employee's Retirement Association (PERA). He served for several years on the Advisory Committee to the City of Denver's \$5 billion fund. Currently, Ben chairs the Board of the Colorado Zoological Trust, which is the supporting foundation to the Denver Zoo. He serves on the board of Challenge Foundation and the Advisory Board of Colorado Inclusive Economy, where he was a founding CEO. Ben is a proud member of the Colorado Forum, a nonpartisan organization of community leaders committed to advancing creative, long-term solutions to challenging civic issues. He was selected as the Conscious Business Leader of 2019 by Conscious Company.

Ben earned his Bachelor of Arts from Brown University and his MBA from the Daniels School of Business at the University of Denver.

### **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.**