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A WORD ON INVESTMENT COMMITTEES: PROCESS IS KING

06 Jun, 2019

Not long ago, I was asked to make a presentation on Investment Committee Development. As I prepared for this presentation, I drew on my own experience with investment committees. I also found several interesting research sources. One was a Trustee Primer produced by the CFA... More

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IS YOUR INVESTMENT POLICY A STRAWMAN?

06 May, 2019

Everyone "knows" that organizations that invest should have an investment policy. Why is this so important? As Yogi Berra says (and the CFA Institute's primer for investment trustees reemphasizes), "If you don't know where you're going, you're liable to end up somewhere else." Faced with the... More

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RISKS: A BALANCING ACT

06 Apr, 2019

Asset Allocation for Life Plan Communities can be a tricky exercise. Unlike a charitable foundation, the core mission of a Life Plan Community involves running a business, with emphasis on financing, marketing, facility management and many other crucial functions. The enterprise risk that is at… More

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CONNECTING THE DOTS: THE LINKAGE BETWEEN FINANCIAL RATIO ANALYSIS, ASSET ALLOCATION & MARKETING

06 Mar, 2019

Financial ratios lie at the heart of many benchmarking studies in the CCRC and Life Plan Community industry and can be crucial elements with regard to strategic planning, financing and refinancing projects. Are these ratios also germane to how senior living investments are allocated? We… More

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DECISION, DECISIONS: A CLOSER LOOK AT A COUPLE OF COMMON INVESTMENT COMMITTEE DEBATES

06 Feb, 2019

I recently had a prospective non-profit client share a few of the "decision points" his investment committee was concerned about in regard to their investment process. He shared that the committee was debating whether they should hire a firm whose marketing focus was both national… More

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Jim Jeffery, Managing Director of Procyon Partners LLC, is a leading financial advisor to senior living organizations and high net worth families with more than 35 years' experience navigating financial and capital markets.

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