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Financial Planning

How organizations can spend less time on investments and more time on impact

Economic uncertainty. Market volatility. The challenge of balancing long-term growth with near-term spending needs. These and other pressures can weigh heavily on endowments, foundations, and other nonprofits—pulling focus away from their core goals and objectives.

That's why many institutions turn to experienced guidance to bring clarity, discipline, and confidence to financial decision-making. Below, we'll explore some common concerns faced by nonprofit institutions, along with ways to address them.

Q: What's a common growth challenge faced by nonprofit institutions?

Rebecca W. Jacklin: Whether it's a foundation, an endowment, or any other nonprofit, most institutions' challenges have to do with meeting the goals and objectives set forth by their organization.

For instance, some nonprofits may struggle to adhere to spending policy that meets their goals while balancing investments to help them achieve their long-term objectives.

Many nonprofits also have limited internal resources, so their staff is often asked to wear multiple hats. Sometimes, that can lead to them spending more time paying attention to investments than on helping their clients, constituents, and community to drive impact.

Q: How can an institution overcome those kinds of challenges?

Rebecca W. Jacklin: Frequently, the answer is to find the right partner outside the organization who can help. An experienced advisor can help design strategies that support long-term objectives while addressing near-term needs. The same partner could monitor markets and the economy, adjusting portfolios so that the organization doesn't have to do it all themselves.

Q: What qualities should an organization look for when choosing an advisor?

Rebecca W. Jacklin: The advisor should be a person or firm who has experience working with similar organizations and can look at decision-making through



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A principal of Goelzer Investment Management, Rebecca Jacklin serves as Managing Director, Institutional Advisory Services, overseeing the firm's suite of consulting services for endowments, foundations, nonprofits, and governmental entities. A member of Goelzer's leadership team since 2025, Rebecca has more than two decades of experience advising institutional clients and leading investment consulting practices.

an institutional lens. Beyond that, look for someone who takes a personalized approach: someone who'll take the time to understand your institution, its responsibilities, and its goals. I would also suggest looking for an advisor who goes the extra mile and does their own research, to ensure that they're bringing the organization the best ideas—not just the conventional ones.

Q: What can a good institutional advisor provide?

Rebecca W. Jacklin: Everything from thoughtful portfolio construction, to policy development, to ongoing monitoring, to clear reporting. The best advisors function as more than just a vendor, but rather as an extension of the institution's team and a mission-aligned partner.

Q: Can an advisor help an institution focus on its mission?

Rebecca W. Jacklin: Absolutely. Investments require constant attention. By taking responsibility for an investment portfolio, a skilled advisor can remove a substantial burden from an institution's team, and free them to devote more time to their programs, constituents, and communities. This also offers greater peace of mind.

Q: How so?

Rebecca W. Jacklin: Leaders can rest easier knowing that a dedicated advisor is watching the markets, managing risk, and doing whatever they can to help the institution's mission continue—today and in the future.

Goelzer helps institutions make lasting impacts

For large nonprofits and private foundations expecting more than traditional investment management, Goelzer's highly experienced senior institutional consultants can work as an extension of your team. Partnering with boards, committees, and leadership across the nation, we gain a thorough understanding of your organization, its responsibilities, and its long-term goals. Then we use original research to create market strategies tailored especially for your organization—helping you navigate uncertainty and move your work forward with greater peace of mind.

Let's talk

If you'd like to learn more about the many ways our senior institutional consultants can strengthen your endowment, foundation or other nonprofit, call 317-264-2600 or visit GoelzerInc.com. ●

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