



ViaGem Consulting

Ask yourself...

Is our strategy focused on meeting our organization's specific goals?

Is our process meaningful and useful to all parties involved?

Are we positioned to take advantage of opportunities and avoid common investment pitfalls?

(such as: hidden risks and hidden fees)

Are we taking on the appropriate level of risk for our situation?

Are we doing the best job possible as fiduciary stewards and fulfilling applicable standards?

Are our investments managed in accordance with our written investment policy statement (IPS)?

Does our IPS define an appropriate structured socially responsible investment strategy?

Have parameters been set regarding time horizon, risk level, expected returns, and appropriate asset classes?

Is our investment strategy implemented in accordance with the level of prudence required by law?

Do we have a process in place to periodically review how effectively we are meeting our fiduciary responsibilities?

Imagine being able to consistently affirm each of these important aspects.

If you answered "Don't know" or "No" to any of these questions, it's OK, because this is the type of work we do with our clients, and we would welcome the opportunity to talk with you to see if we can help.

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