



ViaGem Foundation Program

For under-funded organizations, ask yourself...

Do we have investments or do we anticipate receiving funds from outside sources in the near future?

Have we prepared a financial plan to address the various needs of our organization or developed a case statement for requesting additional financial support from outside sources?

Do we have a method for transferring and accumulating funds to/for our organization that is efficient and avoids hidden fees and hidden risks?

Are our investments organized and secure, and have we prepared an Investment Policy Statement (IPS) consisting of guidelines, objectives, and criteria for investing?

Do you have the knowledge, experience, and skills to manage our assets and the investment process ongoing according to prudent investment practices?

Do we have a method for monitoring and reporting information about the funds and their use, so that the best interest of all parties are served over the long-term?

For financially stable organizations, ask yourself...

Do we anticipate allotting and sending funds to support organizations, programs, projects, or missions outside our own, by way of community or alternative investments, or donations?

Do we have a good sense of our organization's financial needs for the future, where and how much excess funding could be available for alternative investments or donations, and ways of structuring such initiatives to achieve our mission and objectives long-term?

Have we identified specific initiatives we wish to support that tie to our own mission and objectives?

Do we have a written criteria for making such investment/donation decisions and a structure for allotting funds, distributing them, monitoring and reporting ongoing?

Are we confident, during and after the transfer of funds to our designated recipients, that funds will be managed in a prudent manner, avoiding hidden fees and hidden risks, and invested and used wisely?

Do we have a communication process in place to state the purpose to others clearly and succinctly, and allow for desired flexibility and discreetness?

Please contact ViaGem to discuss additional items relating to these topics: szielinski@viagemconsulting.com or 314-307-1090.

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