

# OUTSOURCED CHIEF INVESTMENT OFFICER

### SOLUTIONS

AAFMAA WEALTH MANAGEMENT & TRUST

## YOUR MISSION OUR STEWARDSHIP

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# TABLE OF CONTENTS

- Meet Our Chief Investment Officer
- **05** What is an OCIO?
- 6 Empowering Military Support Organizations
- 7 You Have a Mission
- **08** The AWM&T OCIO Experience



- 10 Our Proven Process
- How Do You Become a Client of AWM&T?
- 14 Contact Us
- 15 Disclaimer
- 16 About Us

### YOUR MISSION OUR STEWARDSHIP



Paul Jablansky,

Chief Investment Officer

### **Our Mission:**

to be the premier provider of financial planning, investment management, and trust services to the American Armed Forces community.

**Paul Jablansky** is the Chief Investment Officer for AAFMAA Wealth Management & Trust LLC (AWM&T).

He is responsible for setting investment strategy and managing client portfolios. Paul has 40 years of experience in the industry, including roles in research, trading, portfolio management, and investment banking. He was elected to the Institutional Investor All-America Fixed-Income Research Team seven times, and has managed individual accounts, open- and closed-end mutual funds, and alternative investment funds.

Prior to joining AWM&T, Paul held a variety of roles at companies including Salomon Brothers, Goldman Sachs, Banc of America Securities, Western Asset Management Company, and Guardian Life Insurance. While at Banc of America, Paul was an advisor to the House Financial Services Committee and Senate Banking Committee on issues related to mitigating foreclosures during the Great Financial Crisis. Paul earned an AB in Mathematics from Cornell University.



**AAFMAA Wealth Management & Trust LLC** 

Nonprofit organizations supporting military members and their families often face complex challenges in managing their investments — challenges that can divert attention from their core mission. Balancing mission-driven objectives with prudent financial oversight requires expertise, time, and resources that may be beyond the reach of many organizations. This is where an Outsourced Chief Investment Officer (OCIO) can play a pivotal role.

# WHAT IS AN OCIO?

An Outsourced Chief Investment Officer (OCIO) allows you to delegate complex investment management tasks to experts, freeing your team to focus on your mission. By partnering with an OCIO, nonprofits can access professional investment strategies tailored to their unique goals and risk tolerance, enabling them to focus more effectively on their core missions.

#### The AWM&T OCIO Experience

At AAFMAA Wealth Management & Trust LLC (AWM&T), we understand the unique financial needs of military support organizations. Our OCIO services are designed to provide comprehensive investment management solutions that align with your organization's mission and objectives.

# EMPOWERING MILITARY SUPPORTIONS ORGANIZATIONS

WITH OCIO FINANCIAL EXCELLENCE

#### Welcome to AAFMAA Wealth Management & Trust LLC (AWM&T)

As a military support organization, you face unique challenges in fulfilling your vital mission. You deserve Outsourced Chief Investment Officer (OCIO) solutions from an organization exclusively serving the military community.

At **AWM&T**, we proudly understand the needs of those who serve and are honored to offer tailored investment strategies designed to support and enhance your organization's goals.



**AAFMAA Wealth Management & Trust LLC** 



Outsourcing your military support nonprofit's INVESTMENT function to AWM&T frees up your resources to focus on core business activities.

Like you, we share a passion for serving members of the U.S. Armed Forces and their families. As a result, AWM&T possesses an unparalleled understanding of military support organizations' financial needs and objectives.

# THE AWM&T OCIO EXPERIENCE \*\*\*\*\*

Our team will work closely with you to develop investment strategies aligned with your mission and objectives. From there, you will benefit from a long-term relationship based on trust, integrity, and transparency. Count on AWM&T to be your dedicated fiduciary in achieving financial excellence and long-term stability.

#### **★** Focus On Your Mission

When you leave the investment decisions to AWM&T, we'll focus on risk management, asset allocation, and portfolio management so you can focus on core business functions.

### ★ Improve Governance and Risk Management Practices

As a Trust Company, our focus and loyalty are to you and your organization's success. AWM&T will ensure your investments are managed in accordance with your organization's policies and procedures, risk level, and goals, all while advising you along the way.





### **\*** Experience a Broad Range of Investment Options

Obtain access to more investment options than you could access alone. Your investment portfolios will be tailored to your needs and objectives, and our staff will become a valued extension of your team.

### Maintain Ultimate Control Over Investment Decisions and Management

AWM&T's OCIO service will adhere to your Investment Policy Statement (IPS). This will establish a clear understanding of the investment objective, goals, and guidelines, providing a framework for investment decisions to provide a basis for reporting and performance measurement. Those decisions will be commensurate with your risk tolerance, governing instruments, strategic asset allocation, liquidity requirements, asset restrictions, and other constraints.

### **★** Benefit From Competitive Rates

When you choose AWM&T's OCIO service, you'll receive highly competitive rates for customized investment services.

### **★** Minimize Potential Conflicts of Interest

AWM&T does not sell any proprietary investment products. As a regulated fiduciary trust company, we invest for you as if we were you, loyally making investment decisions in your best interest.

### ★ Team Up with Like-Minded Professionals

We only work with select organizations that share our vision of service to the American Armed Forces community. We have an innate understanding of your needs and only serve organizations like yours and ours.

# OUR PROVEN PROCESS

STEP O1 STEP 02

**▶** DISCOVER

STEP 03

**►** SOLVE

### CONNECT

#### Goal:

Demonstrate WHO we are, WHO you are, and determine if a mutual fit exists.

Who is AWM&T?
Our Purpose.
Our Process.
Our Differentiators.

How can we help? Identify initial financial concern(s).

### Goal:

Conduct a financial assessment to determine precisely WHAT is needed.

Gather all pertinent financial data.

Clarify Needs/ Wants/Goals.

#### Goal:

Demonstrate WHY you should consider change and HOW we would assist.

Revisit objectives.

Present our plan/ recommendations.

## STEP 04

### **► IMPLEMENT**

### Goal:

Finalize and sign all agreements, transfer assets, and invest as planned.

### STEP STEP STEP REVIEW & ADJUST

### • Goal:

Maintain and grow our relationship by adding value over the long term.

### HOW DO YOU BECOME A CLIENT OF

### AAFMAA WEALTH MANAGEMENT & TRUST?



Let AWM&T help you navigate the complexities of investment management so you can focus on making a meaningful impact in the lives of those you serve.

Once you decide to work with AWM&T, we'll discuss your mission, organization, and investment policies; and we'll review key organizational documents, financial and investment account statements, and other material to help us truly understand your organization.

Your Investment Policy Statement will become the foundation of our Investment Management Agreement. Your investments will be managed in strict compliance with your policies, and you'll experience improved investment risk management and governance.



# CONTACT

### **READY TO ELEVATE YOUR NONPROFIT'S INVESTMENT STRATEGY?**

Contact AAFMAA Wealth Management & Trust LLC today and embark on a path to financial peace of mind.

### **AAFMAA Wealth Management & Trust LLC**

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### **DISCLAIMER**

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Testimonials were given by current clients, not paid promoters. Our clients received no compensation for their comments, which generated no material conflicts of interest with AWM&T. YOUR MISSION - OUR STEWARDSHIP

### **About Us**

Founded in 2012, AAFMAA Wealth Management & Trust LLC (AWM&T) was created to meet the distinct financial needs of military families. We proudly deliver experienced, trustworthy financial planning, investment management, and trust administration services – all designed to promote lasting security and independence.

We are proud to share the mission, vision, and values of Armed Forces Mutual, our parent company. We consistently build on the Association's rich history and tradition to provide our Members with a source of compassion, trust, and protection. At AWM&T, we are committed to serving as your trusted fiduciary, always putting your best interests first. Through Armed Forces Mutual's legacy and our financial guidance, we provide personalized wealth management solutions to military families across generations.



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