



INVESTMENT MANAGEMENT

COST BENEFIT ANALYSIS FOR MILITARY-FOCUSED NON-PROFITS

An Outsourced Chief Investment Officer (OCIO) can provide your organization with investment strategies aligned with your mission and objectives. Instead of handling finances on your own, your organization and constituents will benefit from a long-term relationship based on trust, integrity, and transparency.

THE COST OF “DOING IT YOURSELF”

- Staff time spent monitoring investments and reading market updates
- Volunteers making high-stakes decisions without professional support
- Reactive strategies that may underperform
- Missed grant or donor opportunities due to lack of financial clarity
- Increased fiduciary liability for the board

THE BENEFIT OF PARTNERING WITH AN OCIO

- Time savings for staff and board to focus on mission-critical work
- Access to deep investment expertise and market insight
- A customized investment strategy aligned with your goals
- Proactive risk management and performance monitoring
- Strengthened fiduciary governance and transparency
- Increased donor and stakeholder confidence



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COST COMPARISON EXAMPLE

Managing a \$2M investment portfolio internally could cost you:

- \$25,000+/year in time and opportunity cost
- Hours of staff labor, plus risk of underperformance

AN OCIO PARTNER MAY PROVIDE

- Better performance through strategic management
- Lower overall risk through diversification and professional oversight
- Stronger governance with clear policies and documentation

The cost of not hiring an OCIO may be greater than the fee to do it right. Learn more about OCIO services from AAFMAA Wealth Management & Trust LLC (AWM&T) by visiting aafmaatrust.com/ocio or calling (910) 307-3500.

YOU HANDLE YOUR MISSION,
WE'LL HANDLE YOUR FINANCES.

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