ALLODIUM®
INVESTMENT CONSULTANTS

David J. Bromelkamp ▪ Presentation Topics

David J. Bromelkamp has over 30 years of investment consulting experience with both institutional and individual investors. He is the fouder of Allodium Investment Consultants where he serves as President and CEO. Dave has a passion for educating institutional and individual investors about the best practices in fiduciary investment management. He would enjoy the opportunity to speak about any of the following topics at one of your events. He can also tailor a presentation to a particular investment topic of interest that you may have.

Area of Interest	Presentation Topics
Prudent Investment Practices	• Introduction to the Global Fiduciary Standards of Excellence • 22 Questions to Assess Your Fiduciary Excellence • Fiduciary Responsibilities of Foundation & Endowment Board Members • Avoid Investment Scams and Ponzi Schemes by Adopting the Global Fiduciary Standards of Excellence • How to Apply the Global Fiduciary Standards of Excellence • How CEFEX Certification Can Benefit Your Nonprofit Organization
Fiduciary Investment Management	**How To Do Any of The Following:** • Establish A Disciplined Investment Process For Your Organization • Draft An Investment Policy Statement For Your Organization • Develop An Asset Allocation Strategy For Your Organization • Reduce Investment Risk With Alternative Investments • Select & Monitor Your Investment Managers • Monitor & Evaluate Investment Performance
Governance	**How To Do Any Of The Following:** • Establish an Effective Investment Committee for Your Organization • Use Your Investment Policy Statement to Build Board Consensus • Improve Your Investment Decision-Making Process
Roles & Responsibilities	• Fiduciary Investment Management: Current Issues for Financial Managers • Fiduciary Investment Management: Role of the Trustee
Fiduciary Entities	**How To Establish An Endowment Fund for Your Organization:** • Investment Strategies for Endowment Funds • Fiduciary Investment Management for Trusts • Fiduciary Investment Management: Prudent Management of Planned Gifts
Hiring an Investment Advisor	**How To Select An Investment Advisor For Any Of The Following:** • Fiduciary Entities • Endowment Funds • Charitable Trusts
Socially Responsible Investing	**How To Do Any of The Following:** • Create and Adopt Socially Responsible Investment Policy • Draft Investment Policy that Aligns with Your Core Values • Align Your Investment Portfolio with Your Mission Statement • Develop an Impact Investment Strategy that will Fulfill Your Fiduciary Obligations • Create an Investment Strategy for Higher Impact
Stewardship	**How To Do Any Of The Following:** • Attract & Retain Donors With Your Investment Policy Statement • Prove Investment Stewardship to Your Board and Constituents