Exceptional Investment Management and Advice for Non-Profits

Providing independent advice to charitable and non-profit organisations is a core part of Koda's service offering. We are passionate, deeply experienced and committed to working with our non-profit clients.

We provide social capital investors outstanding service and peace of mind, in the form of:

Good quality, unbiased advice
delivered by highly experienced equity-owning partners working in an advisory business free of product conflicts.

Prudent risk management
with institutional-grade systems for asset ownership, execution and reporting designed to meet your needs. Assets can be held directly, or through world-class custodians.

Sophisticated investment capability
based on proprietary research and insights from our Investment Strategy Group specifically focussed on your needs - complemented by research and data sourced from leading global and domestic research houses and delivered by a dedicated and experienced Koda adviser.

People and processes you can trust
to support your work. We will be your stable, reliable partner, providing advice and guidance informed by experience and a deep understanding of your needs. Strategies, portfolios, communication, reporting and fee charging arrangements can all be designed to meet your needs.

Tailored solutions
delivered by a dedicated advisory team that will invest time to understand your needs, review your governance framework, design an investment policy and a bespoke portfolio specific to your needs and aligned to your values. Our best ideas and strategies will be applied to your specific circumstances.

Philanthropy & Social Capital services
delivered by our dedicated team. The team's ability to help non-profit organisations increase their impact is based on its experience advising hundreds of non-profits across sectors like education, religion, health, ageing, welfare and the environment. The team's deep understanding of the non-profit sector is complemented by the sector experience of our advisers and board members.

Investment Services

Koda offers a comprehensive suite of services designed to help you operate as a successful and sophisticated non-profit. We have the capability and experience to help you with:

Investment Policy

Creation, development, review and ethical considerations

Investment Strategy

Objective setting, asset allocation, mission-alignment and liability matching

Portfolio Construction

Modelling, stress testing, asset and manager selection

Portfolio Management

Direct and indirect investing, multiple asset classes, domestic and international assets

Asset Custody

Safe, secure, transparent and accessible

Reporting

Comprehensive, tailored and timely

Koda's business has been built to provide non-profits with the security they need. Koda understands that you need your assets to be safe and secure and your investment adviser to be stable and strong. Beyond this, you need to entrust your assets to people with proven capability and experience and you expect them to communicate with you openly and transparently at all times. Koda signs an individual service level agreement with every non-profit client, to ensure these needs are met and surpassed.

Philanthropy & Social Capital Services

Koda's service also includes access to an unrivalled suite of opportunities, delivered by our dedicated, specialist and highly experienced Philanthropy & Social Capital team. All services are specially designed to help you help your organisation increase its impact and achieve its mission. Clients with over $5 million of assets invested with Koda have access to the full range of opportunities and services below:

Koda's annual Future Directions Summit

Mix with peers and learn about the issues shaping the non-profit sector

The Koda Classroom

Attend a unique professional development course for directors and executives

Koda's Digital Impact Hub

Meet regularly to hear about technology and innovation shaping social outcomes

The Koda Non-Profit Asset Allocation Quarterly

Receive our Investment Strategy Group's latest thinking and topical thematic commentary

Annual briefing for your board and executive team

Receive a tailored face-to-face insight into your sector and best practice within it

Market-leading research and education

Stay ahead with our sought-after philanthropy, social capital and investment papers

Major donor insight

Benefit from our deep knowledge and build your own case for support

Independent. Specialised. Experienced.

The financial advice we provide is genuinely independent and trustworthy, with no conflicts of interest, no favoured product alignments, and no commission-linked sales targets.

Our advisers and staff are some of the industry's most experienced wealth professionals. They have outstanding track records in client service and advice.

We are also exceptionally well credentialed as non-profit advisers. Our advisers have collectively advised over 500 non-profit clients with a combined portfolio value of over $4 billion. Our people sit on charity boards, act as investment committee members for leading endowment funds, have studied non-profit leadership at institutions like Harvard and the AICD, and have led major philanthropic and trustee advisory businesses here in Australia.

Please direct invitations, enquiries and Requests for Proposals to your Koda adviser, or:



David Knowles
Partner | Head of Philanthropy & Social Capital
e: david.knowles@kodacapital.com
t: +61 429 726 277



Chris Wilson
Partner | Philanthropy & Social Capital
e: chris.wilson@kodacapital.com
t: +61 428 866 607

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