



*taking you*  
**HIGHER**

**HIGHGROUND**<sup>SM</sup>  
ADVISORS

Protect. Strengthen. Grow.<sup>SM</sup>

# The HighGround ADVANTAGE

HighGround Advisors offers financial expertise designed to protect, strengthen and grow the assets of nonprofit organizations and their donors.

With a specialized, comprehensive array of services and strength in asset management, planned giving and account administration, we can manage all of your needs under one roof. Our goal is to take care of the details so you can focus on serving your *higher calling*.





## ORGANIZATION OVERVIEW

Founded in 1930, HighGround Advisors is an investment and trust services company with almost \$2 billion in assets.

We have an impeccable track record as a first-class financial management company specializing in serving the nonprofit sector. Our complete portfolio of products and services enables us to create customized endowment management and planned giving support tailored to your organization.

Our subsidiary, HighGround Trust Company, was established in 1996 and is chartered by the Texas Department of Banking. Together, we have extensive financial knowledge to provide nonprofits with the highest level of resources and advice.

## WE PROTECT.

HighGround Advisors protects client relationships using a disciplined, ethical and highly transparent approach that safeguards your brand and mission. At the same time, we mitigate risk by balancing your short-term financial needs with long-term objectives.

## WE STRENGTHEN.

HighGround is your one source for expert counsel in a variety of areas including legal, investment management and account administration. We strengthen our clients' understanding of vital information through knowledge transfer and training.

## WE GROW.

Our dedication to our clients goes well beyond maintaining their assets through exceptional investment management services. We continuously identify and develop new solutions designed to grow nonprofit endowments for maximum impact.





# The HighGround PROMISE

For more than 86 years, it has been our mission to encourage, receive and manage charitable gifts for nonprofit organizations dedicated to transforming lives. We are committed to growing your assets while providing high-caliber service for every investment opportunity.

# The HighGround STANDARD



Our standards are lofty. HighGround Advisors combines nearly a century of nonprofit experience with high-touch personalized service. We are dedicated to customized financial management strategies that deliver strong results and empower our clients to make even more of a difference.





## CLIENT PARTNERSHIPS

HighGround Advisors works with more than 400 nonprofit institutions, organizations, foundations and ministries of all sizes. Our unmatched knowledge of nonprofit endowment management has fostered long-term partnerships with our clients — some since 1930.

These lasting relationships are a testament of our ability to deliver consistent asset management with a solid investment track record. They also speak to our exceptional service as well as the tailored solutions we provide to meet each client's particular needs.

## INTEGRATED SERVICES

Our planned giving, asset management and account administration teams work hand-in-hand to deliver integrated solutions.

## PLANNED GIVING

HighGround Advisors is adept at handling all types of charitable gifts, including cash, securities, real estate, minerals and other assets. We understand the importance of these gifts in furthering the ongoing work of missions, education, healthcare, child and family services, elder care and humanitarian aid.

## ACCOUNT ADMINISTRATION

We provide a broad range of account support services for our clients and their donors. By meeting all of your administrative needs, our goal is to free your time to focus on your organization's mission.

## ASSET MANAGEMENT

HighGround delivers exceptional investment management services for our clients. Just as importantly, we work closely with our clients to identify and create new solutions that will grow your endowment. After all, we want to help nonprofits advance their life-changing work.





# The HighGround EXPERIENCE

We are uniquely positioned with the knowledge, expertise and resources in planned giving, asset management and account administration to handle all of your nonprofit needs. HighGround offers you the convenience of a total solution you can trust.

# PLANNED GIVING

**Our ability to structure and implement a diverse range of giving options is the reason why our clients choose us to assist their donors with charitable giving plans.**





*HighGround Advisors has been partners with Buckner International for decades. The financial management done on Buckner's behalf has allowed them to expand their reach and further their mission. Buckner's mission is to transform the lives of vulnerable children, enrich the lives of senior adults and build strong families through Christ-centered values.*

## SERVICES

HighGround Advisors recognizes that you need an experienced team to provide sound charitable giving advice and planning services. Whether your donors are interested in making a gift through their estate or exploring the possibilities of a charitable trust or gift annuity, we offer customized planned gift solutions and comprehensive donor support every step of the way.

You are in capable hands with our full-service administration program. We offer ongoing reporting to you, your donors and your trust beneficiaries. And we deliver even greater value by understanding the importance of donor stewardship, and consistently performing at the highest level of customer service and satisfaction.

# ACCOUNT ADMINISTRATION

A young boy with short brown hair, wearing a blue plaid shirt over a white t-shirt, is shown from the side and slightly from behind. He is gently petting the nose of a brown horse with a white blaze on its forehead. The horse is wearing a dark leather bridle. The background is a soft-focus outdoor setting with green grass and a clear sky.

HighGround Advisors is an experienced account administration provider with a long-standing tradition of outstanding assistance to our clients. As such, we are intensely focused on client service, accuracy and transparency. Our online service portal is designed to provide you with real-time, around-the-clock access to the information you need. You can monitor and manage your endowment and split-interest assets – anytime, anywhere.



*HighGround Advisors works with a wide range of clients such as **Miracle Farm, A Children at Heart Ministry**, offering teenage boys and their families a chance to experience healing, earn an education and to learn respect.*

## SERVICES

HighGround Advisors provides rock-solid account support services so our clients can focus on their charitable missions and ministries. Our staff works closely with your accounting personnel to record and invest incoming receipts accurately and appropriately. And, we diligently monitor account activity and approve authorized distributions.

We want your donors to feel satisfied with their donation. To this end, we prepare any reporting necessary for charitable trusts and gift annuities. We also serve as an overall technical resource to both clients and your individual donors.

# ASSET MANAGEMENT



Whatever your asset management need — endowment management, real estate strategies or minerals management — HighGround Advisors can take care of your organization with investment models designed specifically for nonprofits. Our solutions leverage the expertise of over 40 world-class, institutional investment firms as well as a dedicated internal team of 11 investment professionals.



*HighGround Advisors' breadth of knowledge and comprehensive service offering has attracted notable higher education clients including, **University of Mary Hardin-Baylor, Texas Tech Foundation, Mercer University, Tarleton State University Foundation and Dallas Baptist University.***

## **SERVICES**

HighGround Advisors offers its clients a variety of institutional investment options to manage their financial assets. Furthermore, our areas of investment expertise are specifically geared to the needs of nonprofits, including endowment, corporate assets, building funds and liquidity management.

Our flexible service model is adaptable to the governance needs of the clients we serve, ranging from fully outsourced, turnkey investment offerings to customized options tailored to meet unique needs. We advise and consult to design responsive investment solutions that are highly integrated into your organization's financial objectives.

Additionally, HighGround has the expertise to help manage your mineral assets. Our management solutions include handling division orders, which involves receiving, analyzing and executing the orders on behalf of our clients. If you require asset management services for real estate, we can consult with you and your donors through the acquisition, sale and management of agricultural, residential or commercial real estate.



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