

Manager Analysis - Expertise for Foundations and Family Offices



Manager Analysis Services LLC (MAS), founded in 2003, provides customized services and expertise to benefit non-profits, Family Offices and Institutional Investors.

Professional governance services: MAS principals serve as Board directors for endowments, foundations, and nonprofit organizations. We serve on many boards, are experts at governance processes and fiduciary considerations, and bring the resources of our extensive network of financial industry and legal talents to the clients we serve.

Family office and trust-related services: We are experts for fiduciary matters for trusts and estates, and we serve as trustees and advisers for families. Unlike many trustees who specialize in one area such as law, investments, tax, or family experience, we have an exceptional capability to integrate all these considerations into a cohesive and comprehensive advisory approach. We can ensure that families' investment strategies and service providers are appropriate and calibrated to the families' needs.

Expert Portfolio Evaluations: MAS has performed 2,000+ investment manager evaluations, and each of our 3 principals has 25+ years of experience in investment management, risk, and portfolio analysis. We can assist with any client requesting help with specialized investment-related projects for any type of investment. Our credentials include JD, CFA and FRM designations.

MAS's website has 20+ short policy papers posted on a variety of current Governance, Investment Management, Family Office, Portfolio Construction, ESG/Emerging Manager, and related topics so the reader may gain a sense of our range of expertise and focus. www.manageranalysis.com

**Would a fresh look by expert practitioners help your Foundation or Family Office?
Please contact Chris Cutler, Tom Donahoe or Safia Mehta at 917 287 9551.**