SHOREBRIDGE
WEALTH MANAGEMENT

Delivering client-focused, objective, customizable, and consultative solutions to institutions.

Our Commitment to You

At Shorebridge Wealth Management, we understand the essential role investing plays in supporting your organization and advancing your mission – and that's a responsibility we take to heart. We recognize that institutional investors have unique challenges as they pursue their specific goals and objectives while navigating market volatility and an often complex regulatory environment. Many endowments, foundations, nonprofits, retirement plans and other institutional investors are searching for ways to achieve their investment objectives while controlling risks and managing costs. We're here to help guide you and your portfolio through today's economic and fiscal challenges.

Who We Serve

- Foundations
- Endowments
- Nonprofits
- Associations
- Pension Plans
- Defined Contribution Plans
- Profit-Sharing Plans
- Insurance Companies

Joe Lantz, CFA, CAIA

Managing Director - SWM, Investment Consultant - RJFS

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The Shorebridge representative leading our institutional solutions is Joe Lantz, CFA, CAIA. Joe has over 26 years of experience as an investment professional and has past experiences working with a wide variety of client types, including: endowments, foundations, nonprofits, healthcare, pension, insurance, and defined contribution plans. Most recently, he spent 14 years as the Vice President of Institutional and Analytical Services with Federated Hermes.

Previously, Joe was an Institutional Relationship Manager with Allegiant Asset Management. He previously held positions as a Portfolio Manager for PNC's Charitable and Endowment Asset Management Group, Investment Research Analyst at Mellon Financial, and an Investment Consultant at Yanni-Bilkey Investment Consulting. He holds the Chartered Financial Analyst designation and is also a Chartered Alternatives Investment Analyst. Joe has an MBA in finance from the University of Pittsburgh's Katz Graduate School of Business and a Bachelor's degree in accounting and finance from Duquesne University.

Our Advisory Process

We follow a four-step institutional investment process, and you can trust we'll follow a time-tested approach that ensures your best interests are at the center of each decision we make. Throughout our process, we act in the sole interest of clients and participants by adhering to core fiduciary principles. These principles include clearly communicating all aspects of investment structure, providing diversified investment solutions, constructing portfolios within the investment policy guidelines, and ensuring expenses are reasonable and avoid conflicts of interest.

UNDERSTAND | **DESIGN** | **IMPLEMENT** | **MANAGE**

STEP 1
Discover objectives, establish investment and governance structure and set expectations.

STEP 2
Create a diversified investment menu and/or portfolio tailored to your needs.

STEP 3
Research and conduct due diligence prior to executing your investment strategy.

STEP 4
Monitor investments and markets, and maintain detailed records for your fiduciary documentation file.

We act as fiduciaries offering services to address each client's needs.

- **Discretionary Consulting:** We assist the investment committee with establishing the investment policy's objective and guidelines, offering tailored portfolio construction advice. We take full responsibility for implementing the asset allocation, manager due diligence, selection, replacement, rebalancing, and risk-management.

- **Traditional Consulting:** Collaborative approach between investment committee and consultant, which includes assisting with the investment policy's objective and guidelines, offering tailored portfolio construction advice, monitoring and evaluation, education, communication, and plan reviews as set forth and subject to applicable agreements.

Local Presence
Institutional Resources

Through our partnership with Raymond James, we have access to a comprehensive suite of resources and services to assist institutions. Raymond James is committed to a culture of independence, enabling Shorebridge to provide objective recommendations and act in the sole best interests of clients and participants.

We're Here to Help

*As fiduciaries, the decisions you make as trustees impact your organization's ability to reach its financial objectives. Shorebridge has the investment expertise that can potentially help you save time and increase your productivity so you can focus on what's most important. Please contact **Joe Lantz, CFA, CAIA** at **lantz@shorebridgewm.com** or **412.742.4846**, to learn more about Shorebridge's institutional investment solutions.*

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