Portfolio Management for Nonprofits

You're making a difference in our world.

Let us make a difference in yours.

RAFFA
WEALTH MANAGEMENT, LLC

Portfolio Management for Nonprofits

A longstanding commitment to nonprofits.

At Raffa Wealth Management, we're passionate about helping eliminate the barriers nonprofits face in achieving the best possible market returns. Through careful planning and consideration of your organization's unique requirements and constraints, we can advise you on how best to preserve and grow the investment reserves that help strengthen and extend your vision.

Simple, powerful ideas that stand the test of time.

Our investment philosophy is firmly grounded in the academic principals of Modern Portfolio Theory. We employ an "asset class" based investment approach that's designed to deliver optimal market diversification at the lowest possible cost to you. The goal is to maximize your organization's investment return potential while minimizing risk and volatility.

Transparency, Clarity and Vision: values that make a difference.

We understand how important these values are to organizations in the nonprofit sector. Through clear, concise reporting and personal communication, we function as an objective source of financial guidance – giving you the support you need to report to your Board and committees with knowledge and conviction.

Reporting that enhances decision-making.

Our state-of-the-art performance reporting platform will help your organization make sound investment decisions quickly and easily. Consolidated monthly activity reports and quarterly reviews provide invaluable perspective.

Money. Grow it for good.™

Raffa Wealth Management helps make it possible.

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