

Investment Management Division

The University of Texas School of Law

2018 Nonprofit Organizations Workshop and Institute

Investment Literacy

Goldman Sachs Institutional Client Solutions | January 2018

Topics for Discussion





- I. Overview of the Investment Landscape
- II. Fiduciary Rules and Regulatory Framework
- III. Key Investment Concepts
- IV.Investment Policy Statement

Appendix



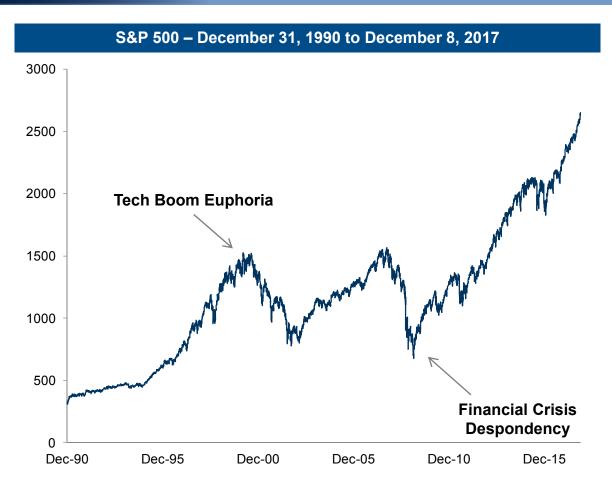
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I. Overview of the Investment Landscape

Investing Can Get Emotional



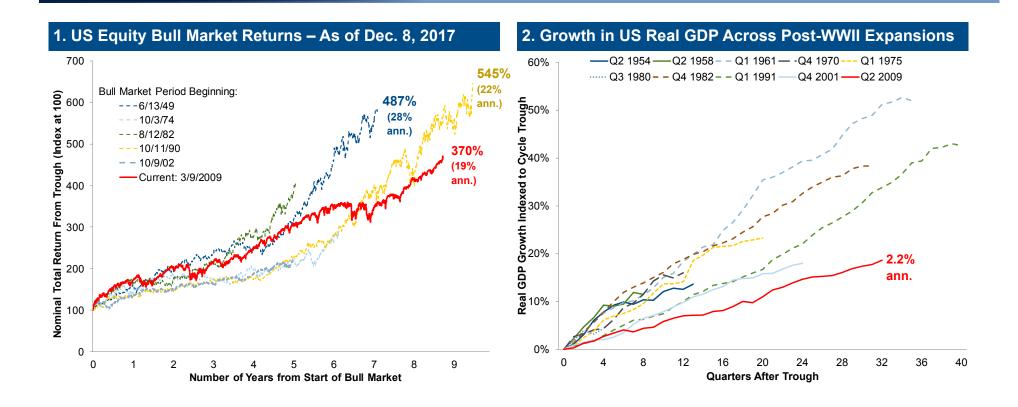




• A thoughtful investment process can reduce the emotions that arise in investing and can give a board "staying power" in challenging market environments.



LONG Bull Market and Recovery



- This bull market is in its 8th year, second only to the almost 10-year rally preceding the tech bubble.
- This economic recovery represents the third longest, but also the slowest recovery in the post-WWII period.





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Also available as part of the eCourse Answer Bar: How to Protect Your Nonprofit

First appeared as part of the conference materials for the 2018 Nonprofit Organizations Literacy Workshop session "3A: Investment Literacy"