

# McQueen

## Financial Advisors

McQueen Financial Advisors  
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### FOR IMMEDIATE RELEASE

McQueen Financial Advisors is proud to announce that we are offering Outsourced Chief Investment Officer Management (OCIO) services.

The OCIO investment management area of MFA provides foundations, non-profits, and charities with professional investment portfolio management. Our OCIO team is prepared to manage your portfolio to fit your unique needs.

As a fiduciary manager, your best interest is always first. We have no conflict of interest with in-house products, inventory that needs to be sold, underwriting deals, brokerage, lending, or anything that is not solely focused on your best interest.

We are utilizing our twenty-four-year history (and our current investment management of nearly \$14 billion) and expertise to provide the OCIO services. We become part of your organization and meet with your investment committee and/or your board of directors on a quarterly or semi-annual basis to ensure we are achieving your objectives.

The OCIO services include:

- Guidance on governance and investment policy design
- Spending policy methodology and analysis
- Review spending and investment policy alignment
- Board education
- Setting long-term targets via strategic asset allocation
- Portfolio review and analysis, including: goals and objectives, target return, asset allocation, portfolio construction, investment manager selection, rebalancing, performance reporting, implementation, and/or execution.

"I founded the firm on the premise that each and every entity deserves personal attention focused on their unique needs. Our focus will always be on the needs of our clients." -Charley McQueen President & CEO

For further information please contact:

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