



April 24th BreakFACTS:

Investments & Endowments: A Primer for Nonprofit Leaders

Facilitated by **Jason Lilly and Susan Daileader**

Sponsored by:

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TRUST**

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**Are you making the most out of your investments?
Learn how to set your organization up for success!**

This month's BreakFACTS will teach you:

- Long-term account types, including reserves and endowments
- Best practices in budgeting
- Spending and Investment policy statements
- Portfolio construction
- Manager selection and review
- Withdrawal strategies in the short and long-term
- Creating and building endowments
- Attracting donors and gathering interest

Date: April 24, 2012

Time: 8:30am Coffee & Registration
9am—12pm Workshop

Cost: \$25/person, includes
continental breakfast

Location: Brocktonian Room
Center for Nonprofit Management
16 Belmont Street

REGISTER HERE!

About the Facilitators:



Jason Lilly, CFA, CFP^R
Director of Portfolio Management

Jason Lilly, Director of Portfolio Management, is responsible for managing client portfolios, performing securities research, and setting investment policy. Prior to joining Rockland Trust, Jason was a financial planner with the Vanguard Group, where he created and developed comprehensive financial plans for high net worth clients. Jason holds a B.S. in Economics from the University of Massachusetts/Amherst and an M.B.A. from Arizona State University. He is a CFA charterholder and has also received his designation as a Certified Financial Planner™. Jason belongs to the CFA Institute, the Boston Security Analysts Society, and the Financial Planning Association.

Jason is a board member on the Planned Giving Council of Cape Cod, Sandwich Community Television, and a committee member and former co-chair of Philanthropy Day on Cape Cod, the largest Philanthropic event on Cape Cod. Jason is the host of "Finance Matter\$", a local access television program focusing on financial topics that impact our daily lives.



Susan Daileader, CFP^R, CLTC
Vice President and Financial Consultant

Susan Daileader is a Vice President and Financial Consultant with Rockland Trust's Investment Management Group, and is responsible for business development in Plymouth County. She began her career in financial services in 1983 at Bank of Boston and has also worked for Shawmut, Fleet, and Columbia Funds Management, holding positions in relationship management, product development, and marketing. Susan has a B.A. from the University of Vermont, the designation of Certified Financial Planner™, and holds a Certification in Long-Term Care (CLTC). She also holds the Series 7 and 63 securities licenses.

Susan recently was elected to the Board of Directors of Friendship Home, Inc., a not-for-profit serving adults with developmental disabilities. She is involved in fundraising activities for South Shore Hospital and the South Shore YMCA.

For more information, call 508-565-1856 or email infononprofit@stonehill.edu.

Center for Nonprofit Management · 16 Belmont Street · Easton, MA 02357 · ph: 508.565.1856



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