Center for Nonprofit Management

October 23rd BreakFACTS: Managing Your Money

Facilitated by Gary Friedmann and Susan Daileader

Sponsored by: Rockland Trust — Where Each Relationship Matters®

Need a fall refresher in nonprofit finance?

This month's BreakFACTS will address:

- The various types of accounts
- Best practices for budgeting
- The basics of good investment management
- Investment Committees best practices
- Hiring a consultant or management firm
- How to set up a good investment policy
- Creating and building endowments

Date: October 23, 2012
Time: 8:30am Coffee & Registration
9am—12pm Workshop
Cost: $25/person, includes continental breakfast
Location: Brocktonian Room
16 Belmont Street

REGISTER HERE!

About the Facilitators:

***Gary Friedmann**, CFA, CFP®*
Vice President & Portfolio Manager

Gary Friedmann joined the Rockland Trust team with over 25 years of investment management experience. Prior to joining Rockland Trust, Mr. Friedmann was a Director of Investments at Washington Trust Investors, where he was responsible for the management of investment portfolios for high-net worth individuals and charitable fund accounts. In addition, Mr. Friedmann was a member of the Washington Trust Investors Investment Committee, which was responsible for setting investment policy for client portfolios as well as the management of the firm's core equity model. Prior to joining Washington Trust, he was a Vice President and Portfolio Manager at Fleet Investment Advisors in Providence, Rhode Island.

Gary graduated from the State University of New York at Albany with a Bachelor of Science degree in business administration with a concentration in finance. He is a CFA charterholder and has also received his designation as a Certified Financial Planner™. Mr. Friedmann also holds a Certificate in Investment Performance Measurement. Gary sits on the boards of the Boys & Girls Clubs of Providence, the Fund for UCAP, the Providence Society of Financial Analysts, and North Kingstown Youth Lacrosse.

***Susan Daileader**, CFP®, 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.