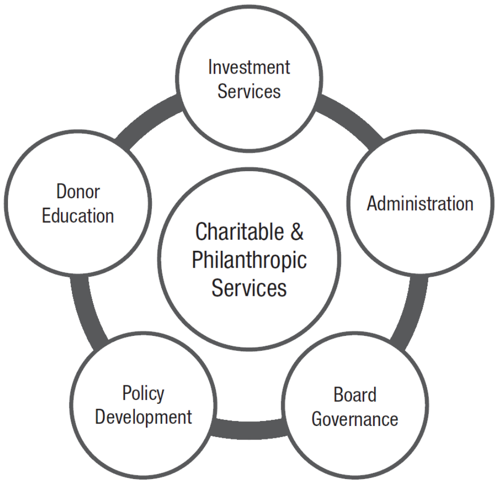
Philanthropic Services

Nonprofits are all about making a difference. But it takes more than a mission and hard work to run an organization. You also need effective financial management.

At First Citizens, we have deep experience in helping nonprofits bring fiscal discipline to their organizations: Helping them manage investments, establish sound administrative practices, communicate with key stakeholders and more. These services allow our clients to spend less of their time managing money and more of it focused on delivering against their mission.

Our philanthropic team can work with you to create financial plans that fit your one-of-kind needs. Size, mission, board requirements, in-house expertise: These are all elements we take into account when creating your financial strategy. We bring broad institutional knowledge that can help you make more effective financial decisions and build a greater understanding throughout your organization of the relationship between mission and money.



Investment Services

We bring a conflict-free approach to investment management that helps your board meet its fiduciary responsibility. You'll have access to a complete range of investment alternatives and strategies to help meet the specific needs and objectives of your organization.

Administration

We understand the responsibilities you face as they relate to the administration and recordkeeping requirements of your organization. We leverage our expertise and resources to facilitate effective processes and procedures.

Board Governance

Today's environment calls for organizations to understand the myriad regulatory issues they confront. We educate board members and staff on current issues and trends in the philanthropic community and offer comprehensive seminars on key topics.

Policy Development

As organizations mature, they face a growing need to develop or revisit policies necessary for their continued growth and service to their community. We assist our clients with the development of policies to cover investments, endowment, gift acceptance and spending.

Donor Education

We offer donor education services to staffs, boards and giving publics on various giving strategies and methods for obtaining additional resources for your organization.

Get Started Today.

To schedule an appointment with a financial consultant, visit your local First Citizens branch, or call our Brokerage Call Center at 1.800.229.0205 weekdays between 8:00 a.m. and 5:30 p.m. Eastern time.