Prime Capital
ENDOWMENTS & FOUNDATIONS

# Institutional depth. Mission clarity. Stronger governance.

Boards are navigating rising complexity across fast-moving markets, expanding governance demands, and growing expectations around mission and impact. We help simplify the landscape, clarify decisions, and coordinate the work so leaders can focus on what matters most.

***Every client is a client of one to us***

Institutional capabilities, customized for your distinct needs - without the distance of a mega-platform.

## HOW WE CAN HELP

### 01

**Investment Management & OCIO Solutions**

- Portfolio strategy
- Public + private markets
- Manager oversight
- Board-ready reporting

### 02

**Mission & Impact Strategy**

- Mission alignment
- Sustainable + impact investing
- Thematic opportunities
- Measurement + education

### 03

**Governance & Philanthropy**

- Board governance
- Grantmaking strategy
- Family foundations + DAFs
- Complex charitable gifts



WHY PRIME CAPITAL FINANCIAL

# Institutional capability. Personal attention.

Built for organizations that need sophisticated investment resources, but still value direct access, customization, and a coordinated advisory relationship.

**$45B+**
Firmwide assets under management

**PUBLIC & PRIVATE**
Markets and alternatives

**ONE PLATFORM**
E&F + Family Office + Wealth + Tax

## THE PRIME DIFFERENCE

### *High-touch, senior access*
Customized service with direct access to experienced decision-makers.

### *Institutional investment depth*
OCIO, alternatives, manager research, risk oversight, and board-ready reporting.

### *One coordinated platform*
Investment, Family Office, Wealth, Retirement, and Tax resources working together.

### *Mission-aligned heritage*
Experience connecting portfolios with organizational purpose and stakeholder priorities.

## WHO WE SERVE

Organizations and philanthropic vehicles across a range of needs, structures, and stages of growth.

- Foundations
- Endowments & Nonprofits
- Schools & Healthcare
- Faith-Based Organizations
- Philanthropic Families & DAFs
- Boards & Committees

*"Lasting impact is created when investment strategy, mission, and governance inform one another."*
**Mark Hays | President, Prime Capital Endowments & Foundations**

**mhays@primefinancial.com**
primefinancial.com/endowments-foundations/

Advisory products and services offered by Investment Adviser Representatives through Prime Capital Investment Advisors, LLC ("PCIA"), a federally registered investment adviser. Tax planning and preparation services are offered through Prime Capital Tax Advisory. PCIA: 6201 College Blvd., Suite 150, Overland Park, KS 66211. PCIA doing business as Prime Capital Financial | Wealth | Retirement | Wellness | Family Office | Tax Advisory | Endowments & Foundations.