First Merchants Nonprofit Banking

Empowering Nonprofits Through Trusted Financial Partnership

At First Merchants Bank, our Nonprofit Banking Division is dedicated to helping mission-driven organizations prosper, grow, and amplify their impact. With a team of experienced nonprofit banking professionals, we offer tailored financial solutions that go beyond traditional banking—serving as a true partner in your mission.

We understand the unique financial needs of nonprofits and provide a comprehensive suite of services including:

- **Customized Operating Accounts** with lower fees, the ability to earn interest on all balances, and a higher earnings credit rate
- **Treasury Management Tools** focused on fraud prevention and efficiency at a reduced rate
- **Flexible Lending Solutions** for cash flow, capital projects, and real estate
- **Governance Support** through investment policy development, liquidity planning, and board education

Please contact Jill Robisch at jrobisch@firstmerchants.com or at 317.566.7602 with any questions.

Institutional Asset Management for Mission-Driven Organizations

With a team of over 100 experienced professionals, we advise clients on more than $6 billion in assets, delivering comprehensive, mission-aligned financial stewardship. Our collaborative and conscientious approach ensures your organization's legacy and impact are sustained for generations to come.

Our team—comprised of wealth managers, portfolio managers, and institutional advisors—works closely with nonprofit and institutional clients to understand their unique goals, governance structures, and fiduciary responsibilities. We deliver multi-disciplinary expertise across investment strategy, policy development, and operational execution, ensuring your organization receives the right solutions at every stage of its financial journey.

Our Institutional Services Include:

INSTITUTIONAL ADVISORY	Strategic guidance tailored to your mission, governance, and long-term financial objectives.
INVESTMENT POLICY DEVELOPMENT	Collaborative creation and review of investment policies that align with your values, risk tolerance, and fiduciary standards.
ASSET ALLOCATION MODELING	Data-driven modeling to optimize portfolio diversification and align with liquidity needs and spending policies.
PORTFOLIO CONSTRUCTION	Customized portfolios built with a focus on performance, risk management, and socially responsible investment strategies.
CUSTODY OF ASSETS	Secure and transparent asset custody solutions with detailed reporting and compliance support.
RETIREMENT PLAN SOLUTIONS	End-to-end support for employer-sponsored retirement plans, including plan design, fiduciary oversight, and participant education.

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