

First Merchants Nonprofit Solutions



Empowering Mission. Strengthening Impact

More than a financial provider, we are a dedicated nonprofit partner. First Merchants delivers specialized solutions, strategic guidance, and educational resources that help mission-driven organizations strengthen sustainability, support growth, and maximize community impact.

Our Nonprofit Solutions Include:

- › **Customized Operating Solutions** designed to support day-to-day financial management, liquidity, and organizational efficiency.
- › **Treasury Management & Fraud Prevention Tools** that enhance security, strengthen internal controls, and improve operational effectiveness.
- › **Flexible Financing Solutions** for working capital, strategic initiatives, facilities, equipment, and organizational growth.
- › **Governance & Financial Stewardship Support** including investment policy development, liquidity planning, board education, and financial best practices.

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



First Merchants
Helping you prosper

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Institutional Asset Management for Mission-Driven Organizations

Managing charitable assets requires specialized expertise, disciplined oversight, and a deep understanding of fiduciary responsibility.

Our institutional advisory team partners with nonprofit organizations, foundations, and endowments to develop customized investment strategies that align financial resources with mission priorities. Through a collaborative approach, we help organizations strengthen financial stewardship, support long-term sustainability, and preserve assets for future generations.

With more than \$6 billion in assets under advisement and a multidisciplinary team of experienced professionals, we provide strategic guidance across investment policy development, asset allocation, portfolio construction, custody services, and retirement plan solutions.

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 SERVICES	Secure and transparent asset custody solutions with detailed reporting and compliance support.
WORKPLACE WEALTH	End-to-end support for employer-sponsored retirement plans, including plan design, fiduciary oversight, and participant education.

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