



Is your school challenged by:

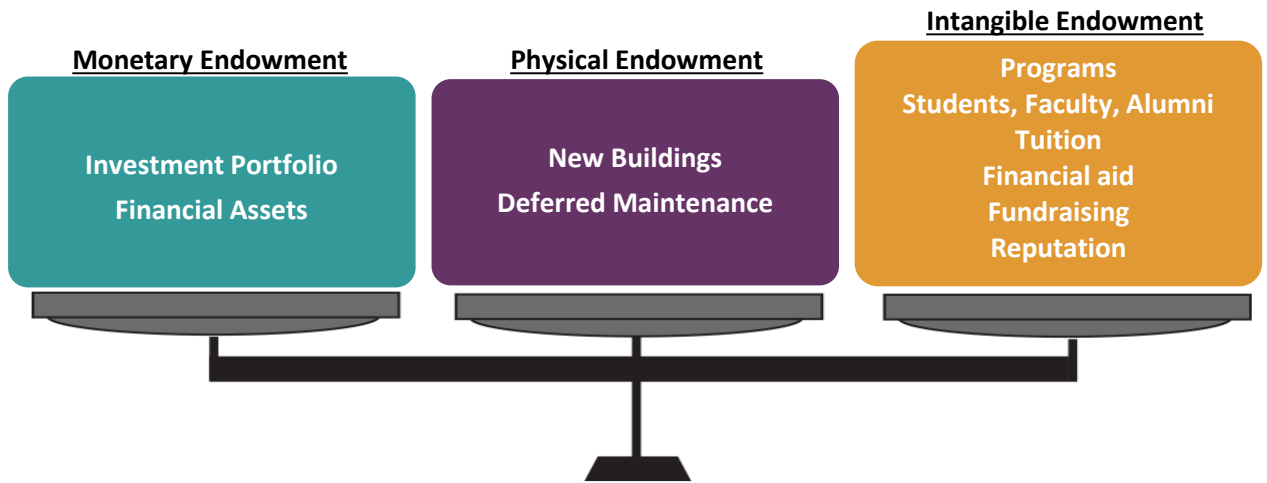
- Continually rising program expenses?
- Costs maintaining/updating plant and property?
- Keeping your competitive advantage?

Our enhanced endowment financial management program

- Brings a fresh perspective on the definition of endowment assets
- Finds the optimal balance of programs, financial aid and philanthropy to support your operating and capital budgets
- Models a range of financial options with 'what if' scenarios
- Leverages institutional strengths to maximize the benefit to the institution

Balancing the trade-offs

An effective, efficient, and sustainable balance of your resources



Your trade-offs affect the balance

- A few sample scenarios might include:
- Raise financial aid/lower tuition vs. reposition portfolio
 - Raise tuition & fees vs increase endowment spending
 - Defer maintenance vs add new programs



DECISION MATRIX

Choose optimal scenario for achieving goals

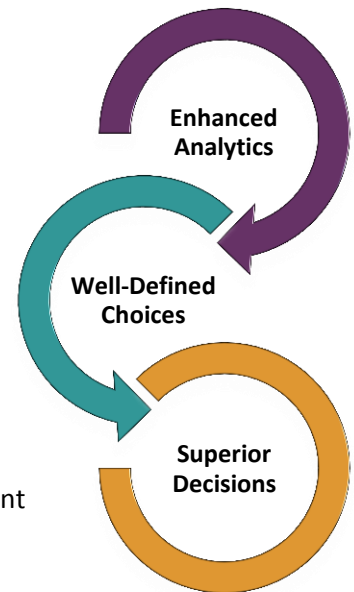


LONG TERM FINANCIAL STABILITY



Decisions today preserve choices for tomorrow

- ✓ achieve informed and disciplined decision-making
- ✓ assess budgetary viability (current, intermediate, long-term)
- ✓ determine feasibility of current and future projects
- ✓ evaluate financial opportunities and risks
- ✓ design fine-tuned investment programs to meet your goals



Why Solaris?

We sit on the same side of the table as our clients

We marshal our collective expertise to be a valuable resource to the management of an operating nonprofit.

Experienced as Board Trustees... and as consultants to Board Trustees

We use our extensive backgrounds in public finance, on non-profit boards, finance and audit committees to develop strategies based upon the financial strength, liquidity needs/preferences, organizational growth, regulatory compliance and risk appetite of each of our clients.

We help fiduciaries fulfill their obligations

We understand that our role is to facilitate better, prudent decision-making by Management and the Board / Investment Committees.

Value-added advice to schools and colleges

Clients have sought our advice on financing, investments, including the investments of bond proceeds such as debt service reserve funds, liquidity support funds, project funds, as well as bond and interest rate swap structuring, debt retirement, and bond pricing.

Firm Overview

Founded in late 2003 as a specialized investment and wealth consulting firm for families and not-for-profit institutions, Solaris Advisors provides specialized advisory services that enable operating not-for-profit institutions to achieve informed and disciplined decision-making. Our extensive backgrounds in public finance, on non-profit boards, and investment, finance and audit committees, give us better and more insightful understanding of the unique financial challenges of educational institutions. Boards and staff find this unique, singular perspective and focus to be particularly helpful in their prudent and skillful management of their strategic objectives.

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