



INVESTING TO SUPPORT YOUR MISSION

Endowments and foundations must balance today's spending needs with tomorrow's mission. Fort Washington partners with nonprofit organizations to build and manage investment programs designed around both—bringing institutional investment expertise, a consultative approach, and a long-term perspective to each relationship.

INSTITUTIONAL INVESTMENT EXPERTISE

Over 70 investment professionals serving endowments, foundations, and nonprofit organizations with investment capabilities spanning public and private markets.

CUSTOMIZED FOR YOUR ORGANIZATION

Investment programs designed around your mission, spending requirements, liquidity needs, risk tolerance, investment guidelines, and long-term objectives.

A PARTNER WHO UNDERSTANDS NONPROFITS

We work closely with boards and investment committees, bringing experience serving nonprofit organizations and an understanding of the responsibilities mission-driven organizations face.

\$2.5 BILLION

Endowments & Foundations
Assets Under Management

35+ YEARS

Serving Endowments,
Foundations, and Nonprofits

18+ YEARS

Average
Client Relationship

CINCINNATI

Headquartered & Invested
in Our Community

TRUSTED BY MISSION-DRIVEN ORGANIZATIONS

Representative Relationships Include:

ArtsWave	Cincinnati Zoo & Botanical Garden	Roger Bacon High School
Bayley Senior Care	CISE	The Summit Country Day School
Best Point Education & Behavioral Health	DePaul Cristo Rey	Thomas More University
Cincinnati Art Museum	Franklin University	University of Cincinnati
Cincinnati Opera	Interact for Health	Xavier Jesuit Academy
Cincinnati Symphony Orchestra	Mt. St. Joseph University	Xavier University

INVESTED IN OUR COMMUNITY

Our commitment to mission-driven organizations extends beyond investment management. Fort Washington and Western & Southern Financial Group (W&SFG) share a longstanding commitment to the region, and many of our associates support nonprofit organizations as volunteers and board members. This involvement provides firsthand perspective on the responsibilities and challenges nonprofit leaders face.

728¹

Organizations
Supported

\$71 MILLION

Giving & Sponsorships
Over Five Years

\$37.5 BILLION²

Community Impact
Since 2008

\$10.9 MILLION

Raised for Cancer
Research Since 2007

SOLUTIONS BUILT AROUND YOUR ORGANIZATION

Every organization brings a distinct mission, governance structure, spending requirements, risk tolerance, liquidity needs, and investment objectives. We work with boards and investment committees to develop and manage investment programs aligned with those priorities.

INVESTMENT POLICY & GOVERNANCE

Establishing a framework for informed, disciplined decision-making.

- Investment Objectives
- Investment Policy Development
- Spending Requirements
- Board & Investment Committee Collaboration

PORTFOLIO CONSTRUCTION

Building an investment approach around your organization's objectives and constraints.

- Strategic Asset Allocation
- Risk Management
- Liquidity Considerations
- Public & Private Markets

INVESTMENT MANAGEMENT

Accessing institutional investment capabilities across a broad range of asset classes and solutions.

- Fixed Income
- Public Equity
- Private Markets
- Multi-Asset & Customized Solutions

ONGOING OVERSIGHT

Providing transparency and ongoing guidance as markets and organizational needs evolve.

- Performance Measurement
- Portfolio Monitoring
- Reporting
- Regular Portfolio Reviews

INSTITUTIONAL RESOURCES. LOCAL PARTNERSHIP.

Founded in 1990 and headquartered in Cincinnati, Fort Washington is a diversified asset manager serving institutional and individual investors. As the primary investment management arm of W&SFG, a Fortune 500® company³, we combine broad investment capabilities with the resources and stability of a diversified financial services organization.

\$98.0 BILLION

Total AUM⁴

\$31.5 BILLION

Third-Party AUM

SINCE 1990

Investment Management Experience

LET'S TALK ABOUT YOUR ORGANIZATION'S INVESTMENT PRIORITIES



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Data is as of 06/30/2026. ¹Categories of causes and needs supported in 2025 by Western & Southern's corporate foundation, associates, charitable fundraising campaigns, and community sponsorships. ²Source: The University of Cincinnati Economics Center. ³Fortune and Fortune 500® are registered trademarks of Fortune Media IP Limited and are used under license. Fortune and Fortune Media IP Limited are not affiliated with, and do not endorse the products or services of Western & Southern Financial Group. ⁴Includes assets under management as of 06/30/2026 by Fort Washington Investment Advisors, Inc. of \$92.4 billion and \$5.6 billion in commitments managed by Fort Washington Capital Partners Group, a division.

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FortWashington.com

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Uncompromised Focus®