

investment advice for tribes

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ADVICE FOR TRIBAL INVESTMENTS

Since a tribe's livelihood often depends on resources that must care for all members and future generations, tribal investments require special thought and planning. Your tribe's tolerance for risk, timeframe for investments, and requirements for investment returns must be thoroughly analyzed and carefully weighed.

HOW WE CAN HELP

At REDW, our team members have a long history of working with tribes in many important business arenas: technology, tax, audit, benefits, business valuation and per capita distribution. We have deep relationships with tribes across the country that go back many years, built upon mutual respect and good communication. At REDW Stanley, we believe relationships are the heart of the investment business and we honor our relationship with you by giving you the highest level of personal attention you expect and deserve.

We are knowledgeable in such matters as tribal sovereignty, planning for removal of BIA trust funds and minors' trusts. We have experience in analyzing existing and proposed investment portfolios, educating and helping tribal investment committees, selecting money managers, managing the managers, reviewing investment proposals for the Office of the Special Trustee (OST), as well as managing tribal accounts and educating tribal 401(k) participants.

WHY CHOOSE REDW STANLEY FINANCIAL ADVISORS?

Just as you are fiduciaries of tribal funds, REDW Stanley will be a fiduciary to your tribe. You might be surprised to know not all providers of investment products and services are considered to be fiduciaries.