



Van Hulzen Asset Management

Investment Solutions for Non-Profits & Faith-Based Organizations

TruthPoint Financial and **Van Hulzen Asset Management** have partnered to deliver one-of-a-kind investment solutions for non-profit and faith-based organizations. Our passion is to help people discover their life purpose and craft investment strategies that align with their values and goals.

Van Hulzen brings a values-based perspective, market intelligence, and timely recommendations that help the people they serve make wise investments, budget, and reporting decisions.

How Van Hulzen Works with TruthPoint Financial

TruthPoint Financial sets up your plan design, provides fiduciary advice, and establishes the recordkeeper and the third-party administrator.

Van Hulzen Asset Management collaborates with TruthPoint to provide investment management services. Van Hulzen's team works closely with TruthPoint's clients to build investment solutions that align with their needs. Then, they support each client through TruthPoint's excellent service team.

Van Hulzen Services

A Well-Defined Investment Policy Statement: TruthPoint, working with Van Hulzen, begins by understanding your organization's needs and values. Then, they create a statement of values that define your investment philosophy. Your documented plan serves as guidance for informed decision-making and clarity as they evaluate your expectations. And it helps you understand how your contributions are managed and create criteria to evaluate your investment portfolio.

Values-Based Investing: Van Hulzen and TruthPoint are dedicated to providing investments that align with your values and beliefs. That's why they begin with a discussion around the things that matter the most to you. Then, they build investment portfolios that invest in companies that align with your morals, values, and beliefs. Some forms of values-based investing are BRI (biblically responsible investing), ESG (environmental, social, and governance), and SRI (sustainable, responsible, and impactful).

Manager Selection: Whether they build an open architecture investment menu, a values-based menu, or both, Van Hulzen identifies, selects, and explains your investment strategy. Plus, they monitor the performance of investment managers to make sure your plan is on track. And they recommend changes based on their evaluation of the characteristics and performance of each fund.



Performance Reporting & Monitoring: Van Hulzen and TruthPoint conduct quarterly assessments of your investments to understand how your portfolios perform. They use benchmarks to evaluate data and position return and risk based on the data.

Plan Committee Investment Reviews: Van Hulzen and TruthPoint can support you with in-person or virtual periodic investment reviews, provide commentary on dynamics moving markets and the portfolios, preview upcoming adjustments, and answer questions.

How Van Hulzen Builds Portfolios

Van Hulzen's portfolios are built using the Aladdin Platform — a leader in risk analytics and technology used by many of the world's largest financial institutions.

1. **Managing and building portfolios** – With Aladdin, they ensure portfolios are designed to perform the way they're intended by objectively analyzing potential risk exposures. Of course, they can't predict the future, but they can help mitigate risk and prepare you with a comprehensive view of your portfolio.
2. **Showing you the difference** – Using the 360 Evaluator technology powered by Aladdin, they compare portfolios side-by-side. And they give you an in-depth look at how their proposal could impact your investment experience.

For many clients, Van Hulzen can offer both open architecture and value-based portfolio options in parallel. These portfolios can be customized for individual client needs (both in ESG/BRI values and in terms of risk). They invest for the long-term, adjust as markets move, and use deep research and a disciplined, math-based approach to set their strategies.

Doing so lets them create elegant, values-based investment solutions where investment committees and participants alike can connect.

For participant-directed retirement plans, they organize these portfolio offerings in three ways:

Do It for Me – Target Date Retirement Fund Series from leading investment managers adjust the mix of assets as the participant approaches their likely retirement date. And participants can relax, knowing that their allocations are being wisely managed.

Help Me Do It – Van Hulzen provides preset model portfolios at varying levels of risk that participants evaluate and can choose.

Do it Myself – Van Hulzen sets the overall menu of available investments for clients, and participants can choose their custom mix and adjust it as they see fit.