



COMMUNITY FOUNDATION
**NORTH CENTRAL
 MASSACHUSETTS**



MASON
 INVESTMENT ADVISORY
 SERVICES, INC.
 Institutional Investment Consulting

A Lasting Partnership Based on Integrity and Trust

Since 2005, The Community Foundation of North Central Massachusetts has partnered with Mason Investment Advisory Services, to help manage our growing portfolios. Mason works with over 45 community foundations nationwide and over 75 institutional clients in total. The firm manages over \$10B in assets for their institutional and individual clients and community foundations comprise over half of their institutional assets.

Mason has been recently listed at #13 on *Barron's* list of the top 100 institutional consulting teams and was also listed at #13 CNBC's list of top registered investment advisors or RIAs. In addition, Mason was recently listed as one of the top 100 RIAs by *wealthmanagement.com* as a member of their *RIA Edge 100* list. This award recognizes RIAs who are experiencing outsized growth while also continuing to provide high-quality, hands-on service to their growing client base. The list is not a ranking but is intended to highlight firms who are growing by "doing things the right way."

At The Community Foundation we rely on Mason's support and guidance in managing our assets and their consultative and educational approach with our committee and board.

Community Foundation Mission

We are a trusted steward of the charitable assets, vision, and intent of our donors to do good works now and forever.

Our mission is to improve the quality of life in North Central Massachusetts by:

- Providing donors with a convenient, effective, and informed platform from which to engage in impactful philanthropy;
- Conducting impactful grant-making informed by measurable results; and
- Convening stakeholders around issues of importance to the residents of the region.



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