

# FOR WACO. FOREVER.

## ***A note from Waco Foundation's Investment Partner Colonial Consulting, LLC***

For more than 35 years, Colonial Consulting, LLC has focused on producing long-term investment results for our clients, a vast majority of which are not-for-profit organizations, to help strengthen their ability to make a significant impact in their communities.

At Colonial, we seek to maintain a strong bond among our employees, clients and business partners by ensuring everything we do leads us back to our vision of shaping a better world through investment outcomes. Our vision statement, outlined below, describes the overall purpose of our organization, while our mission statement is intended to provide a description of how Colonial will execute our vision.

**Vision Statement:** Through the pursuit of exceptional long-term investment outcomes, we aspire to enhance the ability of our clients to shape a better world.

**Mission Statement:** Guided by a relentless focus on the facts, in-depth analysis, and unique judgment, we will achieve our vision. To this end, we seek continual growth in an effort to collectively improve our services and advice. This affords every member of the team opportunities for personal and professional growth while moving the quality of our work and its impact to higher levels.

We've also more clearly defined a set of core values to guide how Colonial is expected to operate on a daily basis:

- We seek enduring relationships with and among members of our team, clients and business partners.
- We treat our clients' capital as though it were our own.
- Honesty, integrity and transparency are at the center of everything we do.
- We seek to be a place where members of our team are expected to continuously learn, grow and contribute to ever-improving outcomes for our clients.
- Creative thinking, hard work and communication are encouraged under the umbrella of shared responsibility.
- We foster a culture of accountability, positive teamwork and mutual respect.

Colonial proudly serves a client base numbering 135 organizations, and more than 90% of our \$34 billion in assets under advisement are from not-for-profit organizations. Our ultimate goal is to continue to act as responsible stewards of intergenerational philanthropic capital, and we look forward to pursuing that goal with our partners like Waco Foundation.