



I am pleased to send you another edition of McKinley Carter's Noteworthy for Nonprofits publication. This compilation of articles authored by our advisors and associates is designed to provide anyone engaged in nonprofit work (advisors, board members, staff, and volunteers) with noteworthy information that can impact an organization's success and sustainability.



This issue comes with some exciting announcements from McKinley Carter. First, we are proud to share with you that after months of an independent and comprehensive review of our procedures, our Nonprofit Advisory Services division is CEFEX certified. This means we follow a Global Fiduciary Standard of Excellence - you can read more in [Kathleen's blog below](#). In addition, the MCWS Investment Services Council expanded our investment offerings to offer a portfolio for sustainable investing. [John's blog](#) describes what this means and why it might be important to a nonprofit organization. And last but not least, even if you aren't a car enthusiast, it's hard not to be intrigued by a Tesla. Be sure to click on [Brian's blog](#) to read what he thinks your organization's Investment Policy Statement and Tesla might have in common. You will surely find it to be an exciting ride...I mean read!

Our [Nonprofit Advisory Services](#) mission is to help our clients remain independent and stable through a disciplined investment program that takes into consideration governance, planning, and fundraising. If these or other topics are particularly relevant to your work with nonprofits and you'd like to discuss them further, please feel free to reply back to me and we can schedule a time to talk. I also encourage you to explore the entire INSIGHTS blog library, where you can search by category, author, or keyword on a variety of interesting subject matter.

Sincerely,

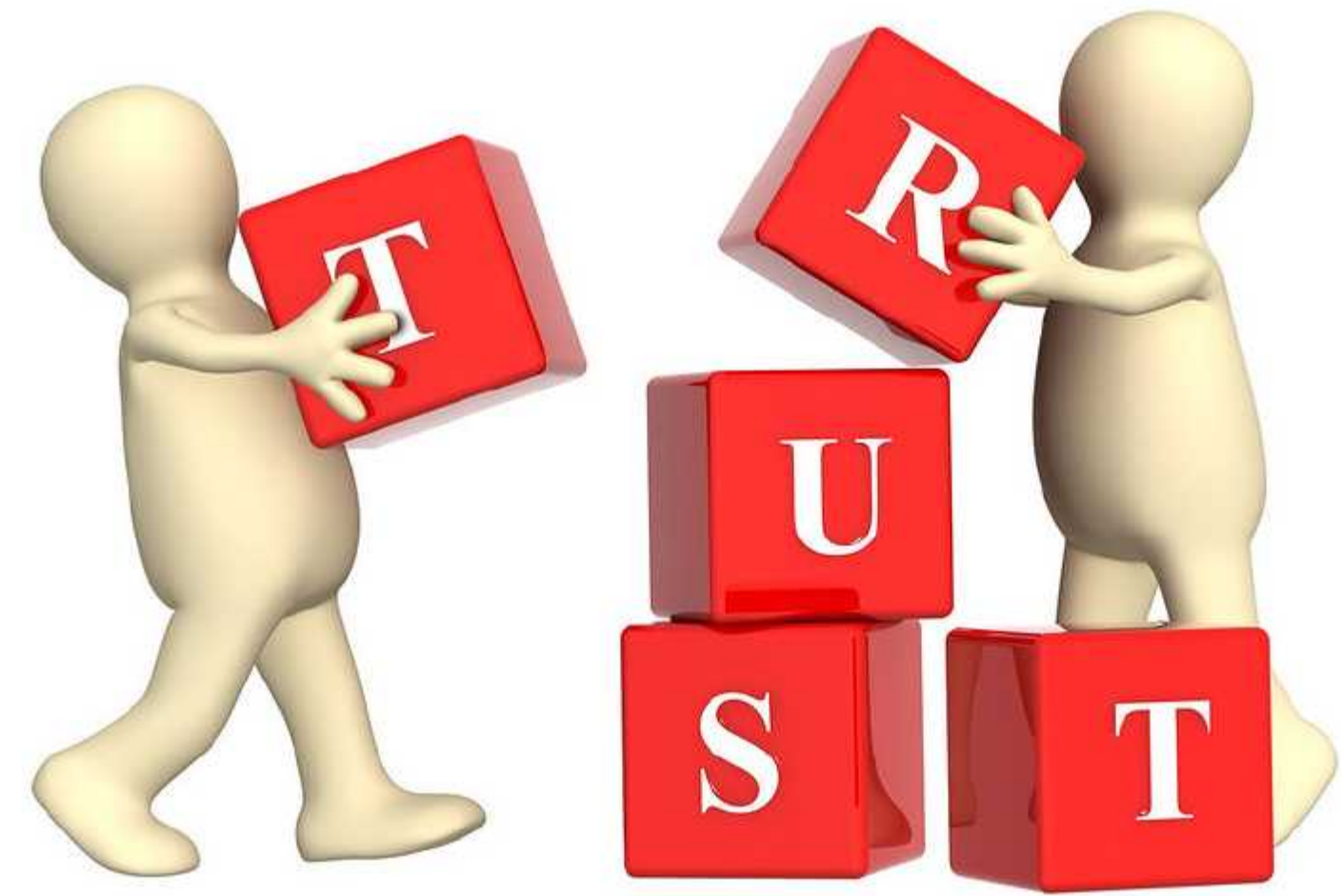
McKinley Carter Wealth Services  
(866) 306.2400



## Trust. Confidence. Integrity — What It Means to Work With a CEFEX Certified Advisor

~ By [Kathleen McDermott](#)

McKinley Carter's Nonprofit Advisory Services division has been awarded certification from the Centre for Fiduciary Excellence, LLC (CEFEX) that demonstrates the firm's adherence to fiduciary best practices, signifying conformance to a recognized global standard of fiduciary excellence.



[Read more](#)

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## ESG Ratings Give Nonprofits More Impactful Investing Options

~ By [John Binz, JD](#)

No one understands the impact of a dollar like non-profit organizations. Often, an organization's ability to change the world for the better relies so much on the stream of donations to fund their mission. However all too often, pursuing that mission stops when an organization's funding outpaces their needs and they turn their attention toward investing. It is now easier than ever to affect positive change in the world while still getting a return on invested capital.



[Read more](#)

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## 3 Things a Tesla Has in Common with Your Investment Policy Statement

~ By [Brian Gongaware, CFP®](#)

If you serve on a 501(c)(3) executive or finance committee, you are responsible for drafting and maintaining a sound Investment Policy Statement (IPS) for your organization. Did you know that there are many commonalities between a well-drafted IPS and the unique engineering advancements that Tesla has brought to the automobile industry?





[Read more](#)

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**For More Information:**

[Visit our Nonprofit Advisory Services page](#)

McKinley Carter is an SEC-registered investment adviser. For information pertaining to McKinley Carter’s fees and services, please contact McKinley Carter for a copy of our disclosure statement as set forth on our Form ADV. For information pertaining to our registration status, refer to the Investment Adviser Public [Disclosure](#).



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