



# Philanthropy Partners of the Cape and Islands

A member of the Partnership for Philanthropic Planning

For immediate release

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## Philanthropy Partners of the Cape & Islands presents “*Best Practices: Board, IPS’s and RFPs*” June 20<sup>th</sup> Luncheon Presentation in Hyannis

**Yarmouth Port, MA, May 22<sup>nd</sup>, 2012** - The Philanthropy Partners of the Cape and Islands is pleased to announce that Gary Friedmann, CFA, CFP®, Vice President and Portfolio Manager at Rockland Trust in Providence will present “**Best Practices: Board, IPS’s and RFPs**” on June 20th, 2012 during a luncheon to be held from 11:45 a.m. to 2:00 p.m. at the Hyannis Golf Course, Route 132, Hyannis. This luncheon meeting is free to members of the Philanthropy Partners of the Cape and Islands. Non-members pay \$35. To register for this session, please call (508) 280-1822, email [mwhiteppci@aol.com](mailto:mwhiteppci@aol.com) or register online at [www.capecodgiving.org](http://www.capecodgiving.org). Deadline for registration is Friday, June 15th, 2012.

### ***About the session: Best Practices: Board’s, IPS’s and RFP’s***

Given today’s challenging environment, potential donors, the public and legislative agencies are more focused than ever before on the fiduciary responsibility organizations are confronted with in the daily management of their financial obligations. This presentation will provide an introduction to investment committee best practices, Investment Policy Statements, and the RFP process.



### Learning Outcomes

- ✓ -Identify key areas of fiduciary responsibility and risk.
- ✓ -Investment Policy Statement considerations and design.
- ✓ -RFP management and design.

### ***About the speaker***

Gary J. Friedmann, CFA, CFP®, is *Vice President & Portfolio Manager*

Gary Friedmann joined the Rockland Trust team with over 25 years of investment management experience. Prior to joining Rockland Trust, Mr. Friedmann was a Director of Investments at Washington Trust Investors, where he was responsible for the management of investment portfolios for high-net worth individuals and charitable fund accounts. In addition, Mr. Friedmann was a member of the Washington Trust Investors Investment Committee, which was responsible for setting investment policy for client portfolios as well as the management of the firm's core equity model. Prior to joining Washington Trust, he was a Vice President and Portfolio Manager at Fleet Investment Advisors in Providence, Rhode Island.

Gary graduated from the State University of New York at Albany with a Bachelor of Science degree in business administration with a concentration in finance. He is a CFA charterholder and has also received his designation as a Certified Financial Planner™. Mr. Friedmann also holds a Certificate in Investment Performance Measurement. Gary sits on the boards of the Boys & Girls Clubs of Providence, the Fund for UCAP, the Providence Society of Financial Analysts, and North Kingstown Youth Lacrosse.

**Philanthropy Partners of the Cape and Islands** is a local chapter of the Partnership for Philanthropic Planning, a national organization. More information can be found at [www.capecodgiving.org](http://www.capecodgiving.org) or by calling (508) 280-1822 or writing to: Philanthropy Partners of the Cape and Islands, P.O. Box 41, Yarmouth Port, MA 02675.