



# Financial stewardship with mission-driven impact

*Why more nonprofits are choosing outsourced CIO services to complement their internal team*

Your nonprofit organization is more than its balance sheet. It's a force for good, a catalyst for change and a steward of hope. Yet from regulatory demands to market volatility, the challenges of managing an investment program can be daunting.

That's why more nonprofits, foundations and endowments are turning to outsourced chief investment officer (OCIO) services, sometimes even if they already have an internal CIO. An OCIO can complement internal teams, offering deep investment knowledge, fiduciary oversight and broad market insight.

"Whether you're a lean nonprofit or a complex institution, our job is to be more than advisors, bringing investment expertise, fiduciary discipline and a deep understanding for the values that define your organization," said Brooke Clark, an Institutional Wealth client advisor with BOK Financial®, which provides OCIO services.



## What an OCIO brings to the table

Unlike traditional consultants or managers, an OCIO typically assumes discretionary authority over your portfolio, conducts rigorous manager research and due diligence and serves as a fiduciary—ensuring the organization’s investment program is aligned with your values and objectives.

A holistic OCIO solution includes:

- Strategic advice tailored to your mission and risk tolerance.
- Investment management and implementation services.
- Administrative support to ease operational burdens.
- Open architecture access to a wide array of investment opportunities.

This balanced approach helps manage risk as vigorously as it pursues returns, ensuring your portfolio is resilient, responsive and mission aligned.

## What to look for in an OCIO solution

Choosing the right OCIO is about more than credentials; it’s about chemistry, commitment and customization. The right OCIO provider doesn’t just manage investments; they also protect your nonprofit’s reputation, honor its mission and help turn financial resources into lasting impact.

With this in mind, look for a provider who:

- Takes time to understand your organization’s goals.
- Offers unbiased advice and customized solutions.
- Provides transparent reporting and ongoing performance analysis.
- Supports your governance, risk management and fiduciary responsibilities.

*For guidance on how a holistic outsourced CIO (OCIO) can help your nonprofit, please see [BOK Financial’s OCIO Services Checklist](#).*



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## Benefits even if you have a CIO

Even if your organization has a CIO, working with an OCIO can enhance your investment program, amplifying your internal team’s capabilities. An OCIO can provide:

- Capacity and peace of mind to focus on your core mission.
- Improved efficiency and risk oversight.
- Consistent strategy execution, even amid board or committee turnover.
- Cost savings compared to building a full in-house investment team.

## Your mission deserves more than a money manager

In a world where financial decisions carry reputational weight and long-term consequences, nonprofits need an OCIO who sees the full picture—magnifying your mission, not just managing your money.

Let your financial strategy reflect the same care, purpose and vision that drives your organization every day. With the right OCIO resource, you can turn stewardship into strength and impact into legacy.

As Clark said, “An effective OCIO isn’t just a service provider; they’re an extension of your team. From transparent reporting to customized strategies, we’re here to support your mission with clarity, integrity, and expertise.”

