

Non-Discretionary Investment Advisory Services

FIDUCIARY – FEE-BASED

Investment Portfolio Strategy

- Portfolio Analysis and Monitoring
 - Credit Monitoring
 - Maturity and Call Alerts
- Purchase and Sale Recommendations
- Pre-Purchase Analysis
- Periodic Pricing
- Trade Execution
- Financial Modeling
- Corporate and Municipal Surveillance

Support, Publications, Education

- Monthly Portfolio Review and Cash Flow Report
- Quarterly Investment Presentations
- Formal Board Presentations as Requested
- Policy Review
- Webinars, Seminars, Conferences, etc.
- Weekly Strategy Insights, Economic Reports, Cross-Value Matrix Reports, Ad-Hoc Research and Strategy Publications

Investment Portfolio Analytics and Reporting



STRATEGIC
ANALYTICS



PRE-PURCHASE
& MONITORING



BOND
ACCOUNTING



TACTICAL
ANALYTICS



Let's
Connect



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NON-DISCRETIONARY, FIDUCIARY, ADVISORY SERVICES - KEEP IT SAFE. KEEP IT SIMPLE.

Piper Sandler is pleased to offer a non-discretionary, fiduciary, treasury investment portfolio advisory services to our qualified clients. Our depth of experience puts us in a perfect position to serve the needs of public entities with a non-discretionary investment service.

Our disciplined approach emphasizes capital preservation, liquidity and then yield. This approach serves as the foundation for the tactical and strategic investment decisions of our team. We are continually monitoring current market conditions, as well as formulating prospective market opinions to enhance and simplify your investment experience.

