



Take your mission to its maximum

Who is Acumen Financial Advantage?

At Acumen Financial Advantage, we unlock financial strategies that enhance your mission—helping you attract and retain top talent, boost investment yields, and maximize your charitable impact. Through innovative investments, cost-effective retention plans, and mission-aligned giving, we help tax-exempt organizations like yours optimize resources, strengthen leadership, and stay true to your purpose.

Where we specialize



Investment yield strategies: From Corporate-Owned Life Insurance and institutionally priced annuities to structured products and market exposure, we craft portfolios that consistently outpace benchmarks and advance your mission.



Executive retention: Our expert advisors design, implement, and service Supplemental Executive Retention/Retirement Plans (SERPs) tailored to your leadership's goals—securing long-term stability and retention.



Charitable impact solutions: Amplify your community reach with strategic giving vehicles including impact funds and grant assistance—with the potential to triple your giving.



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Acumen made this as painless and effortless as possible. I now have the additional peace of mind that my future financial health is in much better shape.

— Dr. Esmaeil Porsa
CEO, Harris Health System

What makes us different?

- **White glove service:** An intimate advisory model, limiting client engagements to ensure dedicated, hands-on support.
- **Boutique expertise:** Unrivaled market-trend and tax-code analysis translates into cost-effective solutions designed to outperform industry benchmarks and foster long-term growth.

Results well beyond the status quo

- **Leadership security:** Experience a 20%+ reduction in SERP funding costs while reinforcing executive commitment and organizational alignment.
- **Enhanced returns:** Achieve risk-managed portfolio growth that consistently surpasses standard benchmarks through COLI, annuities, EBPs, and strategic structuring.
- **Amplified impact:** Deploy impact funds and endowment vehicles to expand your philanthropic reach—maximizing social good without compromising fiscal health.

Why Acumen Financial Advantage?

We realize every precious dollar invested is critical to funding your operations, your mission, and your future. Rest assured, every dollar matters more here.

Schedule a complimentary discovery consultation today to uncover tailored strategies for your organization at connect@acumenfa.com.