

Merion Capital LLC

**OUR  
MISSION**

Assist clients in  
achieving financial  
goals

*A fee-only, independent financial  
advisor acting solely in the best  
interests of the client.*

**FIDUCIARY ASSISTANCE**

Develop Investment Policy Statements  
Advise on organizational structure  
Review internal controls  
Emphasize Long-Term  
Manage expectations  
Risk management

**INVESTMENT STRUCTURE**

Asset Allocation  
Portfolio Optimization  
Manager Selection

**RESEARCH AND EDUCATION**

Investment managers  
Academic and practitioner research  
Special projects

**ACCURATE AND TIMELY REPORTING**

Make well-informed decisions  
Reduce staff's administrative burden  
Allow client to focus on mission