Empowering Not-for-Profits to Thrive Financially

Specialised Wealth Management for Purpose-Driven Organisations

Your financial strategy should strengthen your mission - not distract from it.

SCION

Your Mission is to Make a Difference.

Ours is to Help You Do It Sustainably.

Our Commitment

At Scion Private Wealth, we understand that managing the financial future of a not-for-profit organisation is no ordinary task. Every dollar entrusted to you carries a responsibility - to your donors, members, and the communities you serve.

Our mission is simple: to help not-for-profits achieve financial confidence through tailored investment strategies, sound governance, and sustainable growth solutions. We combine deep expertise in private wealth with a thorough understanding of the unique challenges and compliance requirements facing not-for-profit organisations.

Your mission is to create impact, not to navigate complex investment decisions alone. At Scion Private Wealth, we specialise in delivering objective, transparent, and strategic investment advice for Not-for-Profit organisations, ensuring your funds are managed responsibly, ethically, and for long-term sustainability.

We understand the unique responsibilities of NFP boards and committees:

- Meeting fiduciary and governance obligations
- Complying with regulations for charitable funds
- Integrating ESG and ethical investment requirements
- Achieving sustainable growth to support your mission
- Maintaining liquidity for operational needs’
- Providing transparent reporting for accountability

Why Not-for-Profits Need a Different Approach

Unlike traditional businesses, not-for-profits operate under specific constraints:

- Investment Restrictions: Compliance with your constitution, donor intentions, and regulatory frameworks.
- Sustainable Income Needs: Balancing capital preservation with generating income for ongoing operations.
- Transparency & Governance: Meeting the expectations of boards, auditors, and stakeholders.

Standard financial advice often overlooks these unique complexities. Our tailored approach ensures every strategy aligns with your mission, values, and governance framework.

Many Not-for-Profits hold significant funds in reserve, yet the challenge lies in striking the right balance between security and growth. Too often, these funds sit in low-yield term deposits, limiting the organisation's ability to maximise their impact. By implementing tailored investment strategies designed to preserve capital while seeking stronger returns and meeting necessary mandates, NFPs can ensure their money is working harder for their mission without taking on unnecessary risk.

Comprehensive Financial Solutions for Purpose-Driven Organisations

We take a disciplined, transparent, and collaborative approach to investment management, ensuring every strategy aligns with your mission, risk profile, and ESG principles.

1. Discovery - Understand Your Organisation

Understanding your organisation's mission, policies, and financial objectives.
Reviewing cash flow needs and risk appetite.
Engage with your board and committees to define clear roles and responsibilities.

2. Strategy - Create an Investment Policy Statement (IPS)

Designing an investment and governance framework that aligns with your constitution and ethical guidelines.
Establishing objectives, benchmarks, and governance guideline.
Incorporate liquidity needs and ESG considerations.
Ensure clarity for all stakeholders.

3. Implementation - Build a Bespoke Portfolio

Strategic asset allocation across diverse asset classes.
Fund manager selection based on rigorous due diligence.
Establishing and managing your tailored investment portfolio.
Ensuring complete transparency at every stage.
Ongoing monitoring and risk mitigation.

4. Ongoing Support - Report with Transparency

Regular reporting, compliance updates, and strategic reviews to ensure you stay on track.
Tailored quarterly and annual reports.
Secure online access to portfolio performance.
Compliance-focused reporting to support governance.

We Understand Your Challenges and Solve Them Proactively

Pain Point → Our Solution Format:

> "We need growth without risking our capital"

Our portfolios prioritise capital preservation while generating sustainable income streams to support your programs year after year.

> "Our board needs clear reporting"

We provide tailored, easy-to-understand reports for transparency and accountability at every meeting.

> "We must stay compliant with our constitution and regulators"

Our strategies align with your governing documents and meet all ACNC and ATO requirements.

Expertise You Can Trust. Commitment You Can Count On.

Our advisers have extensive experience working with boards, investment committees, and finance teams in the NFP sector. We understand the challenges you face, and we design solutions that ease your burden while protecting your organisation's interests.

Years of experience advising not-for-profit organisations, charities, and foundations. A proven track record in ethical and sustainable investing. Transparent fees and fiduciary responsibility - your interests come first. Collaborative approach with your board, auditors, and legal advisers.

Why choose to partner with Scion Private Wealth?

Transparent Fees, No Commissions
We operate with complete fee transparency with no hidden costs and no commissions. Our remuneration model is designed to align with your organisation's best interests. Fees are charged as a flat annual dollar amount, billed monthly, based on funds under management. No hidden charges, just clarity, value, and accountability.

Security and Custody
Your assets are held securely by independent, highly rated custodians, ensuring safety, segregation, and peace of mind.

Risk Management and Governance
Risk is managed at every level - from asset allocation to fund manager selection. Our framework includes:
- Conducting annual strategic asset allocation reviews
- Stress testing against market shocks
- Continuously monitoring and reporting
- Maintaining clear accountability and documented processes

Personalised Service
Every not-for-profit organisation is unique. We take the time to understand your mission, objectives, and financial responsibilities, tailoring our advice and strategies with care and precision.

Proactive Engagement
We provide structured quarterly reviews and ongoing touchpoints to ensure your investment strategy remains aligned with your goals. We also equip your board and decision-makers with the tools and education needed to make confident, informed choices.

Together, we act as your Outsourced Chief Investment Office, delivering the expertise, structure, and confidence you need.

SCION Team

Jaxon King - Managing Director

Member of the FAAA
Master’s in Financial Planning
Over 20 years experience in the financial services industry

Role:

Jaxon leads your advisory relationship from the very beginning. He works closely with your board and executive team to clearly define your organisation’s goals and responsibilities. As your primary adviser, Jaxon conducts quarterly reviews, provides tailored strategic advice, and oversees investment allocation, ensuring your portfolio remains aligned with your mission and long-term objectives.

Kevin Toohey – Principal of Atchison

Over 20 years experience in financial markets
Master of Applied Finance
Consultant for Investment Allocation
Specialist in the NFP investment space

Role:

Kevin acts as an external consultant, bringing deep expertise in the NFP investment space. He contributes to portfolio construction and provides macroeconomic insights, detailed investment analysis, and strategic updates. Kevin also joins selected meetings to ensure your investment strategy is well-informed and positioned for long-term success.

Clare Pace – Senior Client Service Manager

Over 10 years experience in the financial services industry
Dedicated to providing seamless client support

Role:

Clare is your day-to-day point of contact for all administration matters. She ensures that all queries, paperwork, and operational needs are handled promptly and efficiently, allowing you to focus on your organisation’s mission while we take care of the details.

Mishan Dahia – Research and Investment Analyst

Specialist in portfolio research and construction
Focused on manager selection and ongoing analysis

Role:

Mishan conducts in-depth research and due diligence on fund managers, monitors market developments, and contributes to the design of your portfolio. His ongoing analysis supports the delivery of evidence-based investment solutions tailored to your organisation’s needs.

Ready to Strengthen Your Financial Future?

Let's start with a conversation. Whether you need guidance on endowment management, investment governance, or long-term sustainability, our team is here to support your mission with clarity and confidence.

Jaxon King – Managing Director
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