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Bell Institutional Investment Management (BIIM) has been providing investment management expertise for more than 30 years. The following is an overview of our client focus and examples of services provided. Contact us at 833.701.0955 or institutions@bell.bank for more information and how we can be of service to your organization.

Institutional Investor Services

Insurance Companies

We have a deep history managing investment portfolios for insurance clients for more than 25 years. Insurance clients are inherently unique and require a customized investment strategy. BIIM has the insurance industry experience to consult on critical issues that support your business strategy and help streamline your reporting and accounting. Working hand-in-hand with directors, boards and financial staff, we provide the following:

- Asset allocation modeling
- Strategic planning and investment policy guidance
- Investment-grade fixed income
- Dividend focused equity
- Enterprise Risk Management
- Investment accounting – Clearwater Analytics
- Comprehensive investment analytics and performance reporting

Foundations, Endowments, Nonprofit Organizations, and Corporate Clients

BIIM has decades of experience working with large institutional clients. Our services range from complete investment outsourcing, where we work as an extension of our clients' management team and position ourselves as your Outsourced Chief Investment Officer to investment-only mandates where we manage a specific portion of a client's overall investment program. Some services we provide:

- Investment Policy Development
- Portfolio Implementation
- Dynamic Asset Allocation
- Comprehensive Oversight and Performance Reporting
- Treasury and Enhanced Cash-Management Liquidity Solutions

Individual Investor and Family Office Services

BIIM has decades of experience working with private clients and family offices. Our services include:

- Cost-effective, institutionally-based investment solutions
- Goals-based Investment approach for individuals and families
- Investment policy statement development
- Comprehensive financial planning
- Separately managed and customized portfolios
- Estate and tax planning
- Cash-flow forecasting and liquidity management