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Citizens Private Bank has had the honor to work with the Ocean State Charitable Trust to bring the Endowment Incubator Program to the Not-For-Profit community of Rhode Island since 2007.

The existence of this Fund is to “assist charitable organizations in the State of Rhode Island to develop endowment funds to support the purposes and missions of charitable organizations within the State of Rhode Island through an endowment advancement program for participant charitable organizations.”

Citizens Private Bank brings more than 100 years of professional trust and investment services to the people of Rhode Island and through the Endowment Incubator Fund, we have created a unitized investment portfolio for each participating Not-For-Profit organization. This reduces the time, energy and effort that these organizations have to spend on managing and investing their endowments. Thus, they can concentrate on their organization’s purpose and mission while their endowments are continuously invested and nurtured by Citizens.

The Not-for-Profit organizations who participate in the Endowment Incubator Program receive professional investment management for their endowments, monthly statements, periodic investment reviews and are invited to attend the annual Not-for-Profit Seminar sponsored by Citizens Private Bank.

It is through the hard work and due diligence of the Board of Trustees of the Ocean State Charitable Trust and the numerous colleagues of Citizens Private Bank that we continue to grow this Incubator Fund so that the Not-for-Profit community can continue their mission and provide the essential services that the people of Rhode Island have come to expect.

We at Citizens Private Bank welcome you to the Ocean State Charitable Trust Endowment Incubator Program and look forward to a long and rewarding partnership.

Sincerely,

A handwritten signature in black ink that reads "William R. Logan". The signature is written in a cursive, flowing style.

William R. Logan