

Separately Managed Funds For Professional Advisors

As a professional advisor, your most valuable asset is the trusting relationship you have established with your clients. We understand that your goal is to help your clients meet their goals – and that can often include charitable giving.

When your client establishes a charitable fund of \$500,000 or more at The Community Foundation, they may request that their assets be invested by you and your investment firm.

The Community Foundation's Separately Managed Funds program enables charitable funds, such as donor-advised funds, to be invested with an outside investment advisor in a manner appropriate to the fund's time horizon and the donor's grantmaking intentions. Investment portfolio asset allocation ranges are documented in The Community Foundation's **INVESTMENT POLICY STATEMENT**.

Separately Managed Funds are particularly appealing to donors who are transferring assets from a private foundation or who have, or will be, experienced a liquidity event. Donors may also recommend an investment advisor when establishing a testamentary fund, creating a charitable legacy today that lasts beyond a lifetime.

By partnering with The Community Foundation, we can help you increase the impact of your client's philanthropy by offering customized services and enhanced resources:

- Charitable Consultation Services
- Educational Events
- Nonprofit Research and Grantmaking Expertise
- Family Philanthropy Planning
- Acceptance of Complex or Illiquid Assets
- Private Foundation Collaboration Strategies

The Community Foundation's Separately Managed Funds program offers your clients and you, as their financial advisor, a great investment option with full-service administration of their charitable fund.