

The Community Foundation works to strengthen the greater Washington region by encouraging and supporting effective giving and by providing leadership on critical issues in our community. Since 1973, the Greater Washington Community Foundation has partnered with advisors to help their clients achieve their charitable goals.

We understand that, as a professional advisor, your most valuable asset is the trusting relationship you have established with your clients. Many clients wish to continue their relationships with their advisors by recommending that The Community Foundation work with you to manage the charitable assets of their funds, when those funds are \$500,000 or more in value.

The objective of the Greater Washington Community Foundation's Separately Managed Funds program is to enable 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, and within the parameters of The Community Foundation's Investment Guidelines. When The Community Foundation establishes a separately managed fund on behalf of a donor with a qualified investment manager, we work with the advisor to ensure proper communication between the donor's grant requests and the managed assets needed to satisfy these requests.

Separately Managed Funds are particularly appealing to donors who are transferring assets from a private foundation or who have experienced a liquidity event, such as the sale of a business or an inheritance, and want their existing advisors to manage their charitable assets. Donors may also recommend an advisor when establishing a testamentary fund, creating a charitable legacy today that lasts beyond a lifetime.

By partnering with the donor's financial advisor, The Community Foundation can help increase the impact of the donor's philanthropy by offering customized services and enhanced resources:

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

With a fund of \$500,000 or more, The Community Foundation's Separately Managed Funds program offers your clients and you, as their financial advisor, a great investment option and full-service administration of their charitable fund.

FOR MORE INFORMATION, PLEASE CONTACT:

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