

## ADVISOR-MANAGED FUNDS



As a professional advisor, we understand your most valuable asset is the trusting relationship you have with your clients. With an Advisor-Managed Fund at Community First Foundation, your clients can recommend an external investment advisor like you to manage the assets of their donor-advised fund. Give your clients the best of both worlds when you retain your client relationships and we help guide them on their philanthropic journey.

### SERVE YOUR CLIENTS WITH TAX-ADVANTAGED CHARITABLE SOLUTIONS

An Advisor-Managed Fund is appealing to people 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.

By opening an Advisor-Managed Fund, your client receives a customized investment approach and giving tool offered by Community First Foundation, offering impactful, tax-effective philanthropy. We make it easy for funds (individual or bundled) above \$500,000 to be invested with existing external investment advisors, while considering the fund's time horizon and your client's grant-making goals.

As the investment manager, you develop customized portfolios for your client's investment preferences with the goal of growing assets available for philanthropy. Our expert donor services staff provides excellent philanthropic guidance that is strategic, effective and meaningful for your client. We also handle the grant administration and processing so your clients can focus on fulfilling their charitable passions.

### GIVING FROM THE HEART

With our deep knowledge of community needs and local nonprofits, we are uniquely positioned to help your clients give where it matters most. We take the guess work out of giving by verifying charities' 501(c)(3) status, then facilitating the grant approval and distribution of funds.

You manage  
your clients'  
assets; we  
make it easy  
to **GIVE!**

MAKE  
GOOD  
POSSIBLE.

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Community First Foundation is ideally positioned to partner with you and your clients. With access to nearly 3,400 Colorado nonprofits through the Colorado Gives program, we have a deep knowledge and understanding of the nonprofit community. We help your clients give more strategically by taking the guesswork out of giving. Your clients will find comfort knowing they aren't alone in the often-complex world of philanthropy.

The Advisor-Managed Fund is great for donors who are:

- Transferring assets from a private foundation
- Experiencing a liquidity event
- Selling a business
- Receiving an inheritance

Your clients receive exclusive access to:

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

With your trusted financial expertise, we can work together to make good possible by helping your clients meet their philanthropic goals.

# OPEN AN ADVISOR- MANAGED FUND TODAY

## Tax Efficient

Supporting charities through an Advisor-Managed Fund is a tax-effective form of philanthropy. Since we are a nonprofit, donors receive maximum tax advantages.

## Cost Effective

We keep our fees low so more money goes to nonprofits and our communities can thrive. Your clients can avoid the time commitment, complexity and cost of a private foundation by allowing us to manage the administration, grantmaking and record-keeping.

## Convenient

Whether your client wants to support one or many nonprofits, we make giving easy. They recommend the grant and we do the rest.

## Customized Giving Solutions

As a professional advisor, you understand each client's situation is different and addressing their specific goals can be challenging. We offer a wide range of giving options. More importantly, we work closely with you and your clients to identify the best options to meet their individual needs and charitable-giving goals.



Contact Business Development and Community Engagement at [Philanthropy@CommunityFirstFoundation.org](mailto:Philanthropy@CommunityFirstFoundation.org) or 720.898.5900.