NEW OPTIONS FOR FINANCIAL PLANNERS, ADVISORS AND INVESTMENT MANAGERS

When your client wants you to manage their charitable fund

Certain Community Foundation charitable funds can be managed by independent money managers

The Community Foundation of North Central Massachusetts recognizes that financial planners and investment managers have developed trusted and valued relationships with their clients. When an individual, family, nonprofit or company establishes a substantial charitable fund at the Community Foundation of North Central Massachusetts, there is an opportunity for their investment advisor to continue managing the portfolio.

Benefits

- Financial Planners, Advisors and Investment Managers can help their clients achieve their charitable goals—while maintaining the assets in their practice.
- Your client is able to take advantage of the foundation's grantmaking expertise and a client portal to manage their charitable giving, without changing investment advisors.
- It eliminates the need and costly expense of setting up and maintaining a private foundation, which can be a never-ending ordeal.
- Personalized giving. The foundation helps donors and their advisors structure a charitable fund to satisfy specific charitable goals and tax planning objectives.
- We help simplify charitable giving. Your client can enjoy the benefits of having a foundation without the aggravation. They supply the passion and ideas; you, the investment management and the foundation supply the expertise and infrastructure that will help your client leave a lasting legacy.
- Your client will help support the work of the foundation, because the fund's administrative fee will stay in the local community, rather than going to a large commercial institution in another city or state.

Community foundations provide a simple, powerful, and highly personal approach to giving.

We offer a variety of giving tools to help people achieve their charitable goals. Most charitable gifts qualify for maximum tax advantages under federal law. For more information and ideas on ways we can help your clients achieve their financial planning with charitable giving, contact Linda Mack, Vice President for Development and Donor Services, 978.345.8383, ext., 321 or lmack@cfncm.org.

Community Foundation of North Central Massachusetts

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There's so much more we'd like you to know about how your Community Foundation can help you achieve your charitable goals. We welcome the opportunity to work with you. Contact Linda Mack, Vice President for Development and Donor Services, 978.345.8383, ext., 321 or lmack@cfncm.org.