



# Wealth Manager Partnership

The Community Foundation's Wealth Manager Partnership allows wealth managers in our community to provide donor advised funds to their clients as well as continue to provide investment management to those donor advised fund assets.

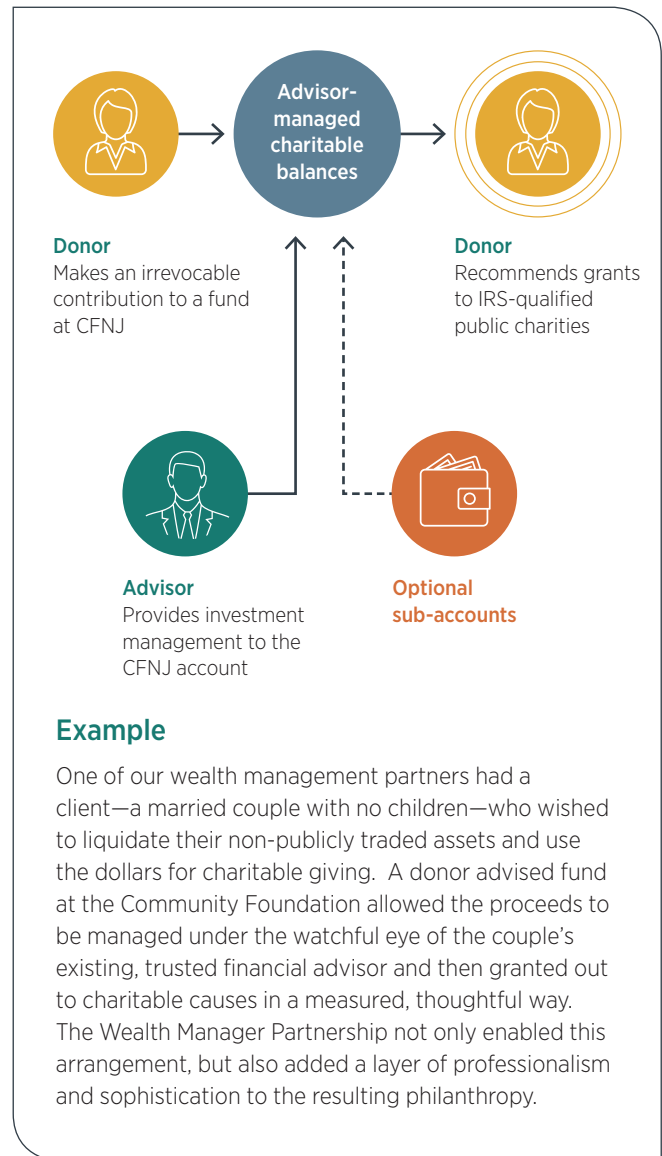
Donor advised funds are one of the most popular vehicles for families to implement their charitable giving. Having access to a responsive, local donor advised fund gives wealth managers an added option to provide their clients.

## How to Set Up

- 1 The Community Foundation handles the administration of the donor advised fund as well as the sub-accounting of the individual donor advised funds within the account.
- 2 The Community Foundation opens an account with the wealth manager to receive the client's donor advised assets.
- 3 The wealth manager, client, and the Community Foundation design an investment strategy to meet the client's charitable plans.

## With this investment partnership, clients can:

- Benefit from the investment management of some (through sub-accounts) or all of their charitable funds by a trusted advisor
- Have the technological and staff support of the Community Foundation of New Jersey for their charitable giving
- Pursue an investment strategy that best supports their charitable giving goals and strategy



**COMMUNITY  
FOUNDATION  
OF NEW JERSEY**

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