



MANAGE YOUR CLIENTS' CHARITABLE ASSETS IN PARTNERSHIP WITH CFL

The Community Foundation of the Lowcountry (CFL) manages over 575 funds with assets exceeding \$120 million. Almost 20% of those assets are managed by investment advisors who have been recommended by donors. Our **Investment Partner Program** enables you to support your client's philanthropic interests in partnership with CFL.

How We Work Together

You continue to manage the investment of your clients' charitable assets while CFL provides comprehensive philanthropic expertise, including fund administration, grantmaking, and charitable services that help fulfill each client's charitable goals. Together, we create a seamless experience that gives clients complete confidence in both the investment management of their assets and the thoughtful administration and impact of their charitable giving.

You may also continue to partner with CFL to manage your clients' matured planned gift. This continued partnership ensures your clients' philanthropic wishes are honored long after their lifetime.

- Donors who establish funds with a balance of \$250,000 or more can continue to use their trusted financial advisor.
- Advisors must be an RIA, IAR or trust entity with at least 10 years of investment management experience and they must manage a minimum of \$50 million in assets with a clean regulatory history (ADV Part II).
- Contact us for complete program details and requirements.

Program Partners

- Our partners include: Chatham Capital Group, Dividend Assets Capital, Edward Jones, Merrill Lynch, Morgan Stanley Wealth Management, Oak Advisors, RBC Wealth Management, Truist, and Wells Fargo Advisors.
- **Add your name here** - We welcome the opportunity to discuss how this program can benefit both you and your clients!



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