WEALTH MANAGER PARTNERSHIP

FACT SHEET

COMMUNITY FOUNDATION OF NEW JERSEY

The Community Foundation's Wealth Manager Partnership allows wealth managers in our community to provide donor advised funds to their clients as well as 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 can allow wealth managers an added option to their basket of services for clients.

HOW TO SET UP

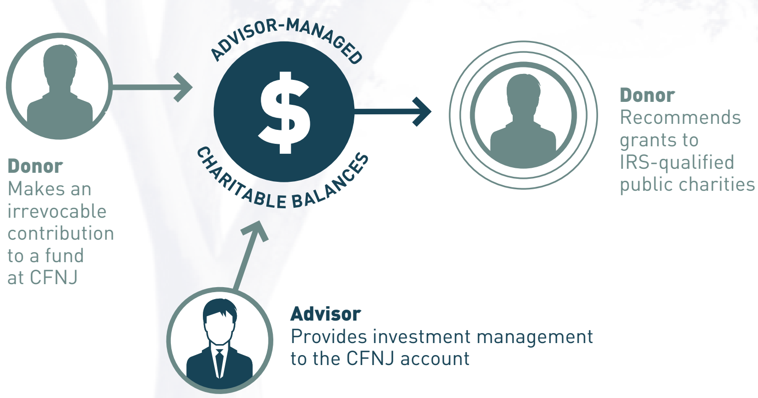
1. **The Community Foundation** reviews and approves (subject to various criteria) the wealth manager to manage a **Community Foundation** investment account made up of the assets of donor advised funds created by their clients.

2. **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.

With this investment partnership, clients can:

- Benefit from the investment management of their charitable funds by a trusted advisor
- Have the technological and staff support of the **Community Foundation** for their charitable giving
- Pursue an investment strategy that best implements their charitable giving goals and strategy

CFNJ DONOR ADVISED FUND



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