

# Serving Professional Advisors

## Who are we?

- Independent 501c(3) Public Charity
- Lay-led Community Foundation
- Receive, Invest and Grant Funds
- More than \$250 Million Assets Under Management as of YE 2022
- Over 540 Charitable Funds and Trusts
- Over \$190 Million+ Granted in Last 10 Years; \$265 Million+ Since Our Founding

## What value do we bring you?

- 60+ Years Experience
- Trusted Partner
- Personalized Solutions
- Collaborative Approach
- Deep Understanding of Donor Needs
- Current and Planned Charitable Giving Expertise

## If your clients are charitably minded, we give you options.

### CHARITABLE GIVING VEHICLES:

- Donor Advised Funds
- Designated Funds
- Charitable Trusts
- Gift Annuities
- Permanent Endowments

### FUNDING OPTIONS:

- Wills
- Cash
- Retirement Accounts
- Life Insurance Policies
- Intellectual Property
- Publicly Traded Securities
- Real Estate
- Personal Property
- Life Estate
- Oil & Mineral Rights
- Closely Held Stock
- Mutual Fund Shares

## Sharing our expertise, supplying you with resources.

- Professional Advisors Series
- The Good Advisor Newsletter
- Professional Advisor Handbook
- Advisor Link Online Tools
- Online Gift Calculator

## It starts with a conversation.