



ARKANSAS  
community foundation

Smart Giving to Improve Communities

# Charitable giving options that are good for your clients and good for your business

The Community Foundation can offer you and your clients many benefits to help achieve their philanthropic goals. When you partner with us, you can retain your clients' investment portfolio and we provide the expertise to make their charitable giving simple, flexible, and efficient.

The Community Foundation has 40+ years of experience collaborating with families, individuals, and corporations to make smart giving decisions. Our staff will do everything possible to meet your needs and the needs of your clients, all while making sure they receive the maximum tax benefits for their gifts. Let's work together.

You can continue to manage your clients' charitable funds & endowments at Arkansas Community Foundation.

## Separately Managed Options

### Endowments of \$10,000 or greater

We partner with American Funds for options that you can manage outside of our investment pool. Your client's permanent endowment at the Community Foundation can be invested in an American Funds portfolio that offers 8 fund options, and you can remain the manager of record.

### Funds of \$100,000 or greater

If a quasi-endowment, —established with a minimum of \$100,000—best suits your client's needs, you can also choose from the 8 American Funds options and remain the manager of record for the fund.

### Funds or Endowments of \$1 Million or greater

For funds or endowments more than \$1 million, your clients can keep you as their manager outside of our investment pool. You can develop your own investment plan based on your expertise and knowledge of your clients' objectives in combination with our separately managed allocation recommendations. You will work with our CFO to customize an allocation to be approved by our Finance Committee for the fund or endowment you manage.



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