

For Advisors

# Your Philanthropy Partner

## Who We Are

The Heartland Community Foundation, founded in 2007, helps individuals, families, and businesses create personalized charitable funds that support game-changing philanthropy. We partner with financial advisors to help their clients achieve their charitable goals. Your investment expertise combined with our knowledge of philanthropy and planned giving work together to provide your client with the best plan possible.

## Our Outside Managed Fund Program

We understand that, as a professional advisor, your most valuable asset is the trusting relationship you have established with your clients. We want to help you continue that relationship by allowing you to continue to invest the funds while we provide philanthropic services. Clients with \$25,000 or more may establish a charitable fund with HCF, such as a donor advised fund, scholarship fund, or designated fund, while you manage the funds on behalf of the Community Foundation and retain your advisor fees.

## How It Works

- We establish an investment account at your firm for your client's charitable fund and you provide the investment services.
- The assets in your client's charitable fund remain under your management. Funds are invested for long-term growth and align with the Community Foundation's Statement of Investment Policy.
- During their lifetime, your clients have access to our staff to assist them in their charitable giving and grant recommendations from their fund to support the causes and nonprofits they care about.
- After your clients are gone, they can have peace of mind that the Community Foundation will continue to honor their charitable wishes in perpetuity, while also keeping their assets managed with you as their valued financial advisor.



## Why Advisors partner with the Heartland Community Foundation:

- Planned giving and philanthropic consultation
- Nonprofit research and grantmaking expertise
- Familiarity with local issues and needs
- Family philanthropy planning
- Acceptance of complex or non-cash assets
- Simplified paperwork and fund agreements
- Preserved advisor-client relationships
- Maximize your clients' charitable dollars

## LEARN MORE

Contact Sarah Meitner, Executive Director  
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[www.heartlandcommunityfoundation.org](http://www.heartlandcommunityfoundation.org)