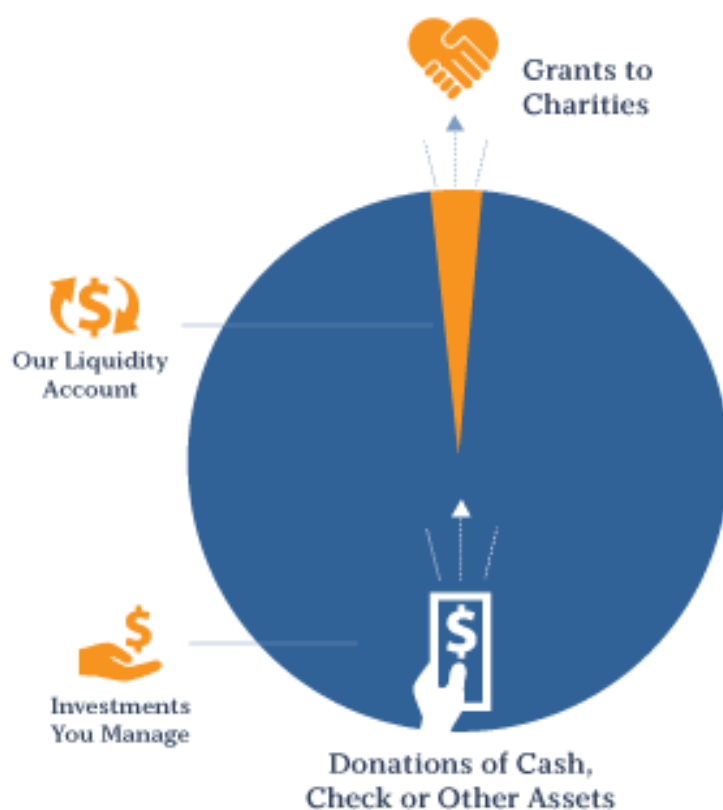


# Financial Advisor Program

## Manage Your Clients' Charitable Assets

Your clients want you to manage their charitable assets. We want to help! Your clients get the maximum charitable benefit when they establish a donor advised fund, endowment, scholarship or any other type of fund at NCF to support the causes they care about and you can continue to manage those charitable assets after they're donated to the foundation.

- You manage all the investments on your platform. For tax purposes, the investment account will be under NCF's tax ID number.
- We work with you to determine the right asset allocation and amount to keep in our liquidity account, which we use for your clients' grants. We will contact you to transfer cash as needed
- When your clients donate cash, stock or other assets to the fund, the donation is tax deductible. We will provide a tax receipt.
- Grant making is easy. Your clients will use our online donor portal to request grants from the fund to the charities they'd like to support. Alternatively, your clients may submit grant requests via phone or email. Our Donor Services team will process and send the grants.



# Manage Your Clients' Charitable Assets

- 1** **Establish a fund (such as a scholarship, endowment, donor advised fund, designated fund, etc.) with Nevada Community Foundation, noting the following:**
  - Your clients sign the form to establish their fund and the investment advisor recommendation form. Once signed, the completed forms serve as the fund's legal establishing document and enable you to manage assets subject to diligence review and oversight by NCF.
- 2** **Set up the investment account.**

Once we receive the signed establishing document, we will provide everything you need to complete your investment account paperwork so you can manage the fund's assets on your platform. To ensure your clients' contributions are tax deductible, the owner of the account will be Nevada Community Foundation. Our officers will be the authorized signers.
- 3** **Contribute to the fund.**

You can work with your clients to transfer any assets from their personal accounts to their charitable funds at NCF. We simply ask that you notify us when you initiate a transfer. Your clients can also make gifts of illiquid assets such as business interests and real estate subject to our gift acceptance policy, which can be converted to charitable dollars you manage.
- 4** **Your clients recommend grants.**

We will send login information to your clients so they can access their fund online. They will be able to request grants from the fund, track charitable activity and access fund statements.

To learn more, contact us at [info@nevadacf.org](mailto:info@nevadacf.org) or call 702.892.2326.