



# Individual-Managed Account

## HAVE YOUR INVESTMENT ADVISOR CONTINUE TO MANAGE YOUR CHARITABLE GIFT

At the Northern New York Community Foundation, we understand that many people have long-standing and valued relationships with their financial advisors. And some want those advisors to have a hand in managing all of their investments — from retirement funds to charitable assets.

The **Individual-Managed Account (IMA) Option** allows your clients to recommend an investment strategy that supports their philanthropic goals using the best possible charitable tools and resources. Community Foundation donors can not only establish a charitable fund and benefit from our extensive grantmaking experience, but may also recommend that the assets be managed by their own financial advisor.

Foundation staff will connect your clients with great organizations and ideas; support their work as philanthropists and maximize the value of every charitable dollar invested. Your clients can establish funds to support students, organizations or causes; they can establish a flexible fund and entrust the Foundation to direct the gift when and where it will do the most good, or they can create a Donor-Advised Fund and recommend which organizations to support.

To take advantage of this investment option, donors must make an initial gift of \$100,000 or more. Assets can be transferred from a private foundation, a Donor-Advised Fund held elsewhere, cash, or appreciated securities. The Foundation will also consider gifts of non-cash assets, such as real estate and closely held stock.

The Individual-Managed Account Option offers your clients a whole new level of service, combining the Foundation's nearly 100 years of philanthropy know-how, network of resources, and grantmaking experience with the investment and financial management expertise of their trusted advisor.

### TO LEARN MORE ABOUT THIS INVESTMENT OPPORTUNITY, CONTACT:

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