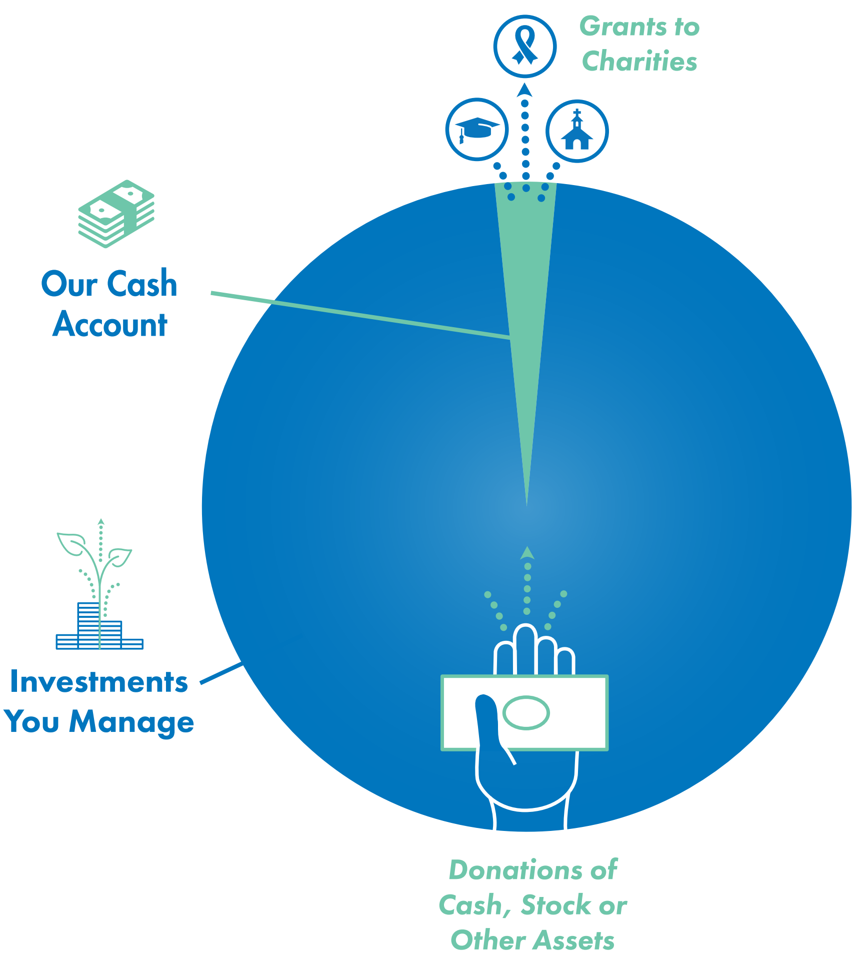
Greater Kansas City Community Foundation℠

FINANCIAL ADVISOR PROGRAM

The Greater Kansas City Community Foundation's financial advisor program is a win-win for you and your clients. Your clients can use donor-advised funds or other types of charitable giving accounts to support the causes they care about, and you can manage your clients' charitable assets after they are donated to the Community Foundation's funds.



- You manage all the investments on your platform. For tax purposes, the investment account will be under the Community Foundation's tax ID number.
- We work with you to find the right amount to keep in our cash account, which we use for your client's grants. We will contact you to transfer cash as needed.
- When your client donates cash, stock or other assets to the fund, the donation is tax deductible, and we will provide a tax receipt.
- Grantmaking is easy. Your client will use our online donor portal to request grants from the fund. Additionally, our Donor Services team can assist your clients who prefer to submit grant requests via phone or email. We will process and send the grants.

MORE

Greater Kansas City
Community Foundation℠

FINANCIAL ADVISOR PROGRAM

(Continued)

1

Establish a donor-advised fund with the Greater Kansas City Community Foundation.

Complete our Donor-Advised Fund Agreement, noting the following:

- List your clients as the fund's advisors and list any successor advisors your clients may want to name.
- Select the first option in the investment recommendation section and list yourself as the fund's investment manager.
- Your clients will need to sign the form to establish their donor-advised fund. Once signed, the completed form serves as the fund's legal establishing document.

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 donor-advised fund's assets on your platform. To ensure your clients' contributions are tax deductible, the owner of the account will be the Greater Kansas City Community Foundation. Our officers will be the authorized signers.

3

Contribute to the fund.

You can work with your clients to transfer any assets between their personal accounts and the donor-advised fund. We simply ask that you notify us when you initiate a transfer. Your clients can also make gifts of illiquid assets (business interests, life insurance policies, real estate), 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 donor-advised fund online. They will be able to request grants from the fund, track the fund's charitable activity and access quarterly fund statements.

To learn more, contact us at info@growyourgiving.org or 816.842.0944.