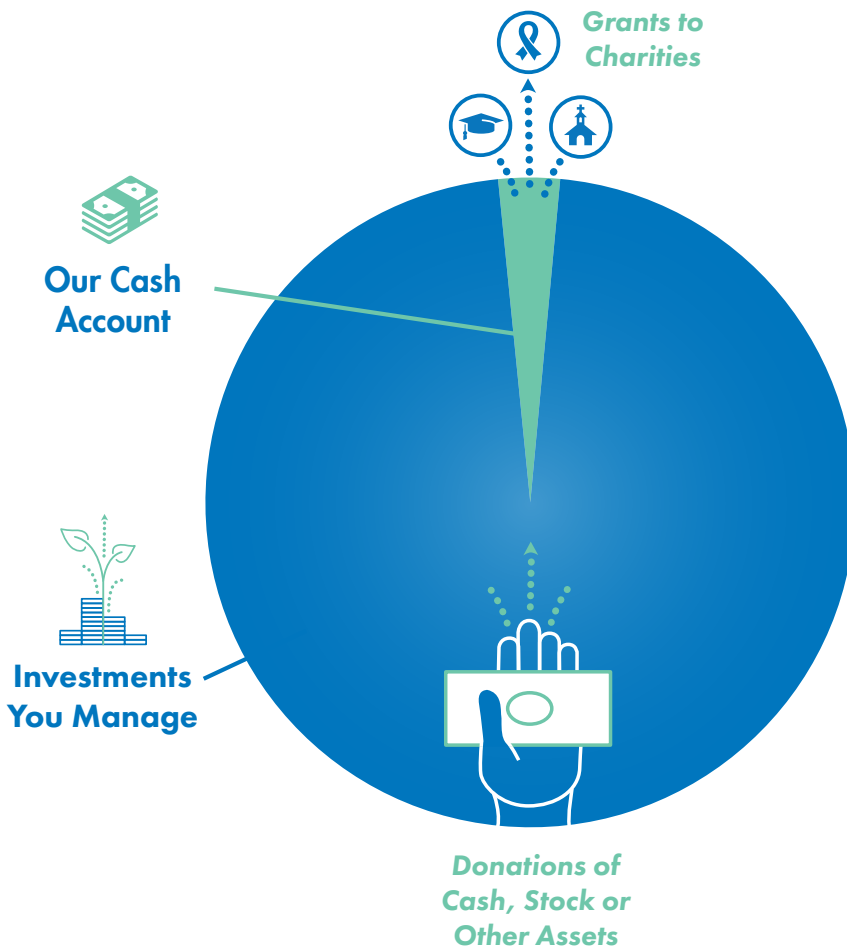


## Professional Advisor Resources

# FINANCIAL ADVISOR PROGRAM

Our financial advisor program is a win-win for you and your clients. Your client can use a donor-advised fund to support the causes they care about, and you can manage your client's charitable assets after they are donated to the fund.



- ▶ You manage all the investments on your platform. For tax purposes, the investment account will be under our 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 | GREATER HORIZONS

# FINANCIAL ADVISOR PROGRAM

*(Continued)*

## 1 Establish a donor-advised fund with us.

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

- ▶ Your clients can choose to set up the fund under either the Greater Kansas City Community Foundation or Greater Horizons, our non-regional entity.
- ▶ 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 either be the Community Foundation or Greater Horizons. 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.

GREATER KANSAS CITY COMMUNITY FOUNDATION | GREATER HORIZONS