



# Advisor-managed option

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

At the New Hampshire Charitable 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.

Our newest investment option — **advisor-managed** — allows your clients to recommend an investment strategy that supports their philanthropic goals using the best possible charitable tools and resources. Donors to the New Hampshire Charitable Foundation can not only create 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 create funds to support students, organizations or causes; they can create 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 \$250,000 or more. Assets can be transferred from a private foundation, a donor-advised fund held elsewhere, cash or securities. The Foundation will also consider gifts of non-cash assets, such as real estate and closely held stock.

The advisor-managed option offers your clients a whole new level of service, combining the Foundation's five decades 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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