

INVESTMENT PARTNERS PROGRAM



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Since 1974, the Mankato Area Foundation has been dedicated to building a community of individuals that believe in the strength of giving. We continue today to shape Greater Mankato through connecting acts of giving with our community's needs. As a permanent, trusted resource, donors look to the Mankato Area Foundation to help them make their charitable giving more effective. The Mankato Area Foundation is impacting the individuals in our community now and for generations to come by providing the expertise to help donors nurture their philanthropic dreams and shape their legacy.

The Mankato Area Foundation Investment Partners Program creates a value-added partnership between financial advisors and MAF. The financial advisor can assist its clients with charitable gifts and still maintain management of the gifted funds. MAF then hires the advisor to manage the gifted funds. The advisor helps MAF and the Greater Mankato area by guiding clients with charitable interests to MAF.

BENEFITS FOR THE ADVISOR'S CLIENT

- Access to MAF's local expertise about non-profits and their work.
- Access to charitable gift planning and services.
- The opportunity to establish a fund with MAF. The fund may be an unrestricted, designated, donor advised fund or scholarship. The client receives an immediate tax deduction and may avoid capital gains tax on appreciated assets, may add to the fund at any time, and if a donor advised fund, can recommend gifts to charities of their choice.
- Working with MAF as a permanent and trusted resource to assist client in making their charitable giving more effective.

BENEFITS FOR THE ADVISOR

- A mechanism for another dimension of client services: charitable giving.
- Access to charitable planning services at MAF.
- The advisor keeps the client's assets under management, while making it possible for the client to contribute those assets to a charitable fund at MAF.
- Assurance of longevity that is evidenced by MAF's historical relationships with advisors.
- Recognition as a MAF Investment Partners Program in program materials, on MAF's website and in MAF's annual report.
- Being a part of further building the resources of MAF, benefiting the community for years to come.

WHO CAN PARTICIPATE IN THE INVESTMENT PARTNERS PROGRAM?

Advisors whose clients have established charitable funds at MAF totaling at least \$200,000 are eligible. The Investment Partners Program relationship may begin with smaller charitable funds, and the \$200,000 threshold may be met by the advisor with aggregate funds over a three-year period of time.

INVESTMENT OPTIONS AND MINIMUMS

- \$200,000 minimum amount to open and actively managed portfolio account, subject to MAF approval.
 - Separate fund accounts must be maintained for reporting.
 - The advisor accepts discretion and signs MAF's standard Agency Agreement.
 - The advisor agrees to abide by the Investment Partner Reporting Requirements.
 - MAF agrees to advisor's standard account management agreement.

OTHER KEY POINTS

- To establish the fund, the client signs a fund agreement with MAF and requests that assets be managed by the advisor. The fund will pay MAF's standard allocation and investment management fee. The financial advisory firm is not party to this agreement. MAF and the advisor enter into advisor's standard investment services agreement, and the advisor manages the newly gifted funds according to MAF's Investment Policy. The charitable gift is irrevocable and the assets are property of MAF.