

Advisor Managed Funds at The Boston Foundation

THE POWER OF RELATIONSHIPS

For over a century the Boston Foundation has partnered with professional advisors like you to help clients achieve their philanthropic goals. We know that as a trusted resource to your clients, you play an essential role in helping them plan for their future, for their family legacy and for their community.

Through our Advisor Managed Fund (AMF) program, you can now provide your clients with all of the benefits of a Boston Foundation fund while you continue to manage their charitable assets.



HOW IT WORKS

The Boston Foundation considers new funds of over \$500,000—that have a likelihood of growing to \$2 million or more—for the Advisor Managed Fund program. This program allows donors to maintain the investment management of their existing advisor while accessing the philanthropic expertise of the Boston Foundation. At your client's request, and upon approval through our due diligence review and onboarding, you will continue to develop portfolios customized to your client's investment preferences and we will provide the administration, community expertise and philanthropic services.

BENEFITS

Conducting their philanthropy through the Boston Foundation offers many benefits to donors.

- Donors can give via a wide variety of assets, and the Foundation can facilitate even the most complex forms of giving.
- Donors receive the maximum tax advantage and we take care of the record keeping and administration.
- Donors can maintain anonymity if they wish, and the Boston Foundation can act as a buffer against unwanted solicitations.

OVER

- Donors are invited to special events—such as workshops to develop their philanthropic mission and approach, presentations by local and national thought leaders, site visits—as well as other programs the Foundation hosts.
- Donors have access to deep program area knowledge and expertise, especially in Health & Wellness, Housing & Neighborhoods, Jobs & Economic Development, Arts & Culture, Education, Grassroots Philanthropy and Nonprofit Effectiveness
- Donors receive personalized service with a dedicated member of our Donor Services team.

Advisor Managed Funds with the Boston Foundation also bring benefits to professional advisors.

- Advisors maintain and strengthen client relationships by providing ongoing investment management of charitable assets.
- Advisors earn greater client confidence by working in tandem with the Boston Foundation on charitable giving.
- Advisors build knowledge and connections to philanthropic opportunities and trends with particular depth in local issues.
- Advisors are invited to special events—such as educational seminars, networking opportunities, site visits—as well as other programs the Foundation hosts.
- Advisors connect across generations when helping families establish a philanthropic legacy through the Boston Foundation.

To learn more, contact [Emma B. Penick](#), MBA, AEP®, CAP®, Senior Director, Gift Planning and Advisor Relations or [Megan Hathaway Foy](#), CAP®, Assistant Director, Professional Advisor Relations.