



**LONGMONT
COMMUNITY
FOUNDATION**



*Working together
to create
mutually beneficial
relationships*

Advisor Managed Funds

We recognize that some donors may wish to have the charitable assets of their fund managed by their own trusted investment advisor. For donor-advised funds of \$50,000 or more, we now offer the option of donors recommending a specific investment manager to invest his or her fund.

Our objective is to create a mutually beneficial relationship in which donors can maintain the existing relationship with their personal advisor, but still enjoy all the benefits of creating a Fund at the Longmont Community Foundation.

Guidelines

Upon request by a donor at the time of the establishment of a fund, and subject to the approval of the Longmont Community Foundation, an outside investment manager may manage assets given by the donor if they meet certain requirements. These include a minimum initial gift of \$50,000 to establish the new fund, as well as the investment manager meeting specific criteria as set out by the Longmont Community Foundation. For more details, please contact us for a copy of the full Policy and Investment Guidelines for Advisor Managed Funds.

We Partner with You

The Longmont Community Foundation is a resource and a partner to help donors and their investment advisors work together to achieve mutually agreed upon charitable and tax goals. We can provide support, information, and expertise regarding charitable giving options.

Contact Us

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Longmont, CO 80501
Tel: 303-678-6555
Email: Eric@longmontfoundation.org
www.longmontfoundation.org

Our History:

The Longmont Community Foundation was formally established in 1994, and has awarded more than \$9 million in grants to nonprofit organizations since its inception. We manage more than 160 charitable funds for local individuals, families, businesses, and nonprofits.

Our Vision:

We envision a future where all people of the St. Vrain Valley lead independent, generous, and creative lives.

Our Mission:

Improving life in the St. Vrain Valley through philanthropy and charitable leadership.