



ADVISOR MANAGED FUNDS

getting started

1 Open the charitable fund with ECCF

Contact **ECCF staff** with a request to open a charitable fund for your client. We will work with you and/or with your client to determine which fund type is best to achieve their charitable giving goals.

- **Stacey Landry, Director of Strategic Giving & Gift Planning, s.landry@eccf.org**
- **Jennifer Mayo, Assistant Director of Gift Planning & Advisor Relations, j.mayo@eccf.org**

Ask Donor to **complete, sign, and return the ECCF Fund Agreement Form**. Ensure they check the box to 'recommend preferred investment advisor' in the Investment Option section. We welcome the chance to help the donor complete the agreement and to answer questions throughout the process.

Allow ECCF 4-6 business days to set up the fund. ECCF staff will notify you and the donor when the fund has been established and will officially welcome the donor into the ECCF community.

2 Set up the investment account with Greater Horizons

ECCF contracts with **Greater Horizons** (the charitable giving services arm of the Greater Kansas City Community Foundation) for back-office support, which includes investment services. As such, after ECCF receives a signed Fund Agreement, Greater Horizons staff will contact you. They will provide everything you need to complete the investment account paperwork, so you can manage the charitable fund's assets on your platform.

To ensure your clients' contributions are tax deductible, the owner of the account will be Greater Horizons, Greater Horizons officers will be the authorized signers, and ECCF will be listed as an additional party to the account.

3 Contribute to the charitable fund

Once the charitable fund is established and the investment account is created, **an initial gift can be made** into the fund.

You can work with your client to transfer any assets between their personal accounts and the charitable fund. We simply ask that you notify us when you initiate a transfer.

ECCF can accept a variety of assets, most easily cash and securities. All complex assets such as real estate or closely held stocks will need to be reviewed and approved by ECCF's Finance Committee and Board of Trustees prior to establishing fund. Please inform ECCF if the donor is interested in gifting complex assets.

4 Your client recommend grants

We will send your client **login information to the online Donor Portal**. Here they will have 24/7 access to recommend grants and track the fund's charitable activity. ECCF's Donor Services Team will soon be in touch with your client to learn how ECCF can help make the most out of their charitable giving.