

Advisor Managed Funds at Essex County Community Foundation

ADVISOR MANAGED FUND (AMF)

Donors establishing a fund of \$100,000 or more can choose to **recommend their investment advisor to maintain investment oversight** of their charitable fund. This allows donors to continue to access your investment knowledge while benefiting from ECCF's philanthropic resources and expertise.



PRIMARY BENEFITS

- Donor creates a charitable fund aligned with their philanthropic goals
- Advisor retains investment oversight and direction of the charitable fund
- Charitable fund assets and fees are maintained by the advisor
- Donor has access to ECCF's donor services team for ongoing grant support
- Donors can give a wide variety of assets, including non-cash and complex gifts

YOUR PARTNER IN PHILANTHROPY

As your clients consider how to turn their success into significance, ECCF can help you achieve their desired philanthropic impact while also achieving beneficial tax outcomes. We offer a variety of resources, giving options and guidance to help you support their charitable goals.

TO LEARN MORE about the AMF program and how you can support your clients' charitable goals, contact:

Jennifer Mayo | Director, Gift Planning & Advisor Relations | j.mayo@eccf.org | 978-777-8876 x135