



BECOME AN INVESTMENT PARTNER

Working Together for Your Clients and the Community

We respect your relationship with your client.

Donors who wish to establish donor advised funds of \$250,000 or more can recommend that PCF retain their personal advisor as the manager of the funds. As PCF's investment partner working on behalf of your client, we create a custom investment option, and you retain the assets under management.

REQUIREMENTS

- A minimum balance of \$250,000
- Approval required by the Foundation's Finance Committee upon review of credentials, experience, Form ADV and other due diligence
- An agreement between the Investment Partner and the Foundation
- Gifts are irrevocable and become assets of the Foundation

ELIGIBLE FUNDS

- Donor Advised Endowment Funds
- Donor Advised Investment Funds
- Family Foundation Funds
- Other Charitable Endowments

FEES

Please refer to PCF Fee Schedule for Administrative fees on the Financial Information page of our website. Investment Partner collects appropriate investment management fees.



"I am particularly pleased to be able to work with the Pasadena Community Foundation when working on various tax planning scenarios with my clients. The Pasadena Community Foundation has a variety of alternatives for my clients for their charitable giving and for the tax savings they receive. They are a wonderful asset to my business."

– Tracy Fillas, CPA Gregory, Fillas & Associates, LLP

