



PASADENA
COMMUNITY
FOUNDATION

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



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PCF is a 501c3 public charity
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