

Thank you for your invaluable expertise in guiding clients to shape meaningful philanthropic goals. The Community Foundation recognizes the key role that you, as your client's professional advisor and confidant, play in structuring a holistic plan to address the needs and desires of clients with charitable interest. We work hard to make the charitable giving process easy and rewarding for all involved. To do that, we have dedicated ourselves to meeting your needs, ensuring that you have the technical information and tools at your fingertips to help your clients achieve their charitable goals.

What we can do for you and your clients...

Highly customized charitable planning	We provide an extremely flexible, accountable, and dynamic charitable platform for long-term giving. Donors can create funds for multiple charitable beneficiaries or allow the Community Foundation to direct the funds to charitable organizations that can most effectively achieve their goals. Also, we will steward the donor's intent and act as a hedge against nonprofit uncertainty.
Amplify impact	We can create funds around a specific area of interest – for example, education, arts, or the environment. This fund can serve as a catalyst to bring other donors in the community to the table with similar interests, leveraging your client's contributions.
Maximize tax savings	We can work with you and your client to identify the most effective type of life income gift to meet their needs and to maximize the benefits of those gifts through the use of the most effective assets and distribution rate.
Serve as a trustee (or not!)	We can serve as trustee of split interest vehicles like charitable remainder trusts or arrange for 3 rd party trust administration if the donor prefers to self-trustee.
Run the numbers	We can prepare charitable deduction calculations for your clients.
Accept non-cash assets	We accept donations of complex, non-cash assets including real estate, closely held stock, art, collections and life insurance.
Facilitate family philanthropy	We can work with your clients who want to create a platform for family philanthropy.
Offer expertise in the community	We are a go-to resource for you and your clients for timely information about community needs and local nonprofits, trends in philanthropy and changes in the regulatory environment that impact charitable giving.

Professional Advisors + Arlington Community Foundation

Your clients may not know...

- How to achieve their charitable goals
- What they can accomplish through effective charitable planning
- How to broach the conversation regarding philanthropy
- How Arlington Community Foundation supports clients and their interests outside of Arlington

How you can support us...

Ask	Asking your clients about their charitable goals in the financial & estate planning process will increase charitable giving across the community. Try these questions: <ul style="list-style-type: none">• Do you have charities that you regularly support that you want to consider including in your estate plan?• What impact would you like to make on the organizations, causes and communities that you care about?• What closely held values are expressed through your giving?• How do you wish to be remembered by family, friends and the community?
Involve us	Involve us during the planning process if you are creating a perpetual charitable gift through the Community Foundation. We will be happy to brainstorm with you about how that gift might be structured to best achieve your client's charitable goals.
Educate	Educate your clients and the community about the unique role of the Community Foundation in building a permanent pool of resources for the community.
Represent ACF	Serve as our ambassadors and advocates in the community. Encourage your friends, colleagues, or clients to call us or visit our website at arlc.org if they have questions, concerns, or see opportunities.
Reach out	If you have questions or would like to discuss a specific situation for a particular client, please feel free to contact Christy Cole.



Connect With Us

Christy Cole
Vice President & Chief Philanthropy Officer
✉ ccole@arlc.org ☎ (703) 243-4785 ext. 206



Separately Managed Funds

Keeping your clients' assets under your management

Arlington Community Foundation allows fundholders to use the investment manager of their choice rather than participating in our investment pools if they meet a few criteria. This creates a win-win situation for you and your clients with charitable interests. You keep the assets under management while your client can leverage our expertise in philanthropy.

Eligibility

Fund Minimum	<p>\$500,000*</p> <p>Multiple individual client relationships with a total value of at least \$500,000 will be considered on a case-by-case basis.</p>
Investment Options	<p>Separately managed funds must adhere to our IPS and contain an asset mix that has the same or lower risk profile than our pools.* Our pools are composed as follows:</p> <ul style="list-style-type: none">• Long-term Option - 80% equities and 20% fixed income• Medium-term Option - 50% equities and 50% fixed income• Short-term Option - 25% equities and 75% fixed income <p>*For separately managed accounts with assets over \$10 million, the manager can propose an investment plan that includes holdings that are less liquid than investments allowed by ACF pools, subject to approval of the Board of Trustees.</p>
Restricted investments	<p>With the exception of being within pooled investment vehicles, direct exposure to the following strategies and types of securities is prohibited:</p> <ul style="list-style-type: none">• oil and gas wells;• interest only securities;• warrants;• principal only securities;• margin trading; and,• inverse floating rate securities.



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