



CFGC

**Individually
Managed
Funds**

Generosity Built on Trust

We understand that trust is essential. That's why we offer donors the flexibility to recommend an external Investment Advisor to manage the assets of their Donor Advised Fund. This customized investment approach allows the Foundation to work with an Investment Advisor you know and trust, while our staff helps turn your charitable vision into meaningful impact.

***An Individually Managed Fund* allows you to create a tailored and customized approach to charitable planning that keeps charitable assets under the management of your trusted advisor. All while utilizing our knowledge to maximize the impact of your generosity.**

“ High net worth families want a customized, comprehensive wealth plan. And in order to be comprehensive, it must include a philanthropic component. The Community Foundation's Individually Managed Funds program allows us to continue to build and foster a relationship with our clients while still providing a highly personalized and tailored giving experience that helps them realize their charitable goals. ”

– FORREST SIMMONS
Senior Wealth Advisor

Make a Difference

The Community Foundation of Greater Chattanooga has staff and resources dedicated to helping our donors transform their generosity to meaningful impact by identifying giving opportunities and partnerships that create the most good while honoring their legacy and passions. In the Individually Managed Funds Program, we partner with trusted Investment Advisors to support and implement your charitable vision. The result is a highly personalized and rewarding experience for Investment Advisors and donors.



Individually Managed Funds

Key Benefits

An Individually Managed Fund is a customized investment account that allows donors to recommend an Investment Advisor to manage donor advised fund assets of \$250,000 or more while our expert staff works with you to realize your charitable goals and maximize your generosity.

- Helps you retain your relationship with your trusted advisor through your charitable giving journey.
- Allows you to develop portfolios customized to your investment preferences and time horizons, with the goal of growing the assets available for giving.
- Requires \$250,000 in assets to establish a new fund and an ongoing minimum balance of at least \$250,000.
- Provides donor access to deep local knowledge and community expertise from the Foundation while allowing you to remain with the Investment Advisor you trust.

Donor Advised, Advisor Managed

Individually Managed Funds are an option for Donor Advised Funds of \$250,000 or more—or an endowed Field of Interest Fund. Donor Advised Funds allow you to recommend grants based on defined priorities, while allowing anonymity and convenient online access—all at a lower cost than establishing a private foundation. You also get access to the Foundation’s deep local knowledge and expertise to create a highly personal and impactful giving experience.

You Manage the Assets

Your Investment Advisor will manage your charitable assets as we work to implement your charitable vision. All donors will have 24/7 online access to review their fund balances and recommend grants, while also having access to our donor services team at the Foundation to answer questions, offer insights, and provide assistance with grantmaking.

Customized Giving

You will have access to a highly personalized fund and the support that helps you maximize your charitable impact. The fund will reflect the causes, organizations, and the community you care about. Our team is here to offer tailored service and strategies to help you carry out your goals as well as invitations to exclusive donor communications, workshops, and educational events.

About CFGC

For over 50 years, the Community Foundation of Greater Chattanooga (CFGC) has served as the region’s primary public foundation. Stewarding over \$210 million in assets, CFGC is leading with love to build a legacy that lasts, offer guidance in philanthropy to donors and people working in the field, and invest in community leaders. We transform generosity into impact by working with donors, non-profits, and the broader community to realize a Chattanooga that works for everyone.

We Are Here to Help

Learn more about the Community Foundation of Greater Chattanooga and Individually Managed Funds by visiting us online at cfgc.org or in person at 1400 Williams Street, Chattanooga, TN 37408. Please contact our President, Maeghan Jones, at mjones@cfgc.org or by calling at (423) 265-0586.

