

Charitable Investment Partners

FOR ADVISORS

The Charitable Investment Partner (CIP) program provides customized investment options that allow your clients to establish charitable funds at the Community Foundation that are invested by you, their trusted advisor.

You maintain investment management over assets while the Community Foundation handles all the reporting and administrative needs of the fund. Additionally, the Community Foundation provides value-added benefits for both you and your clients, including offering connections to giving opportunities and personalized consultation services.



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Being a Charitable Investment Partner has helped deepen client relationships by understanding what is most important to them and implementing strategies efficiently.

Our partnership with the Community Foundation has been a huge value-add for our clients.

TRENT BURLEY
MSFP, CFP®, CEPA®,
RICP®, AEP®, CAP®
Partner & Private Wealth Advisor
McGill Junge Wealth
Management

PROFESSIONAL ADVISOR BENEFITS

RETAIN client revenue and management of their assets

CONVERT non-managed assets such as real estate or privately held business shares, for example, into charitable assets under management

STRENGTHEN client relationships by offering a value-added service

ACCESS to the Endow Iowa Tax Credit, only available through Iowa community foundations

PROVIDE customized solutions tailored to meet your client's giving goals with access to a variety of charitable giving fund types

RECEIVE exclusive invitations to special events with local leaders, professional advisors and donors

CLIENT BENEFITS

PERSONALIZED SUPPORT from the Community Foundation's team of charitable giving experts, including tailored individual and family giving consultation

ACCESS to local nonprofit experts that come alongside your clients to make meaningful connections that maximize the impact of their charitable giving

OPPORTUNITIES to give back to the community and leave a legacy for future generations

EXCLUSIVE INVITATIONS to special events to meet like-minded donors and community leaders

How It Works



CREATE A CHARITABLE FUND

- Contact our team to draft a charitable fund agreement (example: donor advised fund) for your client's review and signature.
- Ensure "Charitable Investment Partner Program" is selected as the investment recommendation to invest your client's charitable assets.



ESTABLISH THE INVESTMENT ACCOUNT

- Once we receive the signed fund agreement, we will provide everything you need to complete the investment account paperwork, so you can manage your clients' charitable fund assets on your platform. To ensure your clients' contributions are tax deductible, the Community Foundation will be the owner of the account, using its Tax ID. Our officers will be the authorized signers.



CONTRIBUTE TO THE FUND

- Your client's contributions to the fund are tax deductible, and we will provide the tax receipt. Work with your clients to transfer assets between their personal accounts and the charitable fund. Your clients can also make gifts of illiquid assets, such as business interests and real estate, which can be converted to charitable dollars you invest. Please notify us when you initiate a transfer.



CLIENTS RECOMMEND GRANTS

- Grantmaking is easy. Your client will use our online donor portal to recommend grants from the fund, as well as track the fund's charitable activity. We provide the due diligence, process and distribute the grants. Our Finance Team will request transfers from you to rebalance your clients' accounts and cover cash needs as they arise.

If you would like more information or to see who already participates as a Charitable Investment Partner, visit us at: desmoinesfoundation.org/cip