

## Chief Investment Officer Firm Aggregate Invested Assets

**HIRTLE, CALLAGHAN** works with the Community Foundation to develop a formal Investment Policy designed to best meet the Community Foundation's long-term objectives. The Investment Policy is formulated on a long-term, broadly diversified strategic asset allocation plan with asset class targets and operating ranges.

As the Community Foundation's CIO, Hirtle Callaghan's full time focus is to deliver strategic and proactive asset class guidance and total investment program implementation of the portfolio's assets including the identification, selection, and termination of investment managers.

Hirtle Callaghan also retains and directs the activities of the independent custodian, and all other vendors involved in providing data, analysis and other services used to manage the portfolio. Hirtle Callaghan provides quarterly statements and performance reports, net of all fees, with comparisons to relevant benchmarks.

## Medallion Investment Partners Separately Managed Invested Assets

The Community Foundation's Medallion Investment program gives you the opportunity to establish a donor advised fund at the Community Foundation, while having a qualified advisor you choose continue to manage the asset and receive investment management fees.

### It all adds up to a winning formula:

- donors supply the charitable passion
- wealth managers & investment advisors supply the investment expertise
- the Community Foundation supplies the charitable legacy vehicle

### All get credit for the perfect charitable solution.

- Medallion status is awarded to investment firms which pass an annual due diligence review undertaken by the Foundation's Investment team.
- Medallion funds are separately managed, non-aggregated funds, which receive their own investment return.
- The minimum amount to start a fund in the Medallion program is \$250,000 with the intent to grow to at least \$1 million.
- The minimum for non-Medallion investment partner program funds is \$25,000.



### There are three Levels of Medallion Investment Partners for Separately Managed Accounts:

 <b>GOLD</b> Foundation Funds Invested	   
 <b>SILVER</b> Planned Gift Pledge Investment Partner	  
 <b>BRONZE</b> Pre-approved as Medallion partner, no funds yet	 
	 

## We Help You Find the Best Charitable Solutions

The Community Foundation is a philanthropy resource for estate planning attorneys, wealth managers, financial planners, and CPAs:

- the client knows their own needs & desires
- the advisor understands financial & estate circumstances
- the Community Foundation understands legacy philanthropy

**It's a winning partnership.** The Community Foundation helps advisors and their clients customize philanthropy solutions for their specific situations, to help fulfill dreams of giving to the community, now and forever.

### PROFESSIONAL ADVISORS

We help you find the  
best charitable solutions  
for your clients

