

# MEDALLION PARTNERS

## SEPARATELY MANAGED INVESTED ASSETS

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

- 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

#### GOLD Foundation Funds Invested



#### SILVER Planned Gift Pledge Investment Partner



#### BRONZE Pre-approved as Medallion partner, no funds yet

