



COBB COMMUNITY
FOUNDATION

INVESTMENT PARTNER PROGRAM

PROGRAM OVERVIEW

Through our Investment Partner Program, qualifying investment firms are engaged by Cobb Community Foundation (CCF) to manage, in a single account, all assets held in their clients' charitable funds at CCF. The investment firm manages the assets collectively while we maintain and track each fund separately. A minimum of \$100,000 in collective charitable funds are required to participate in the Investment Partner Program, and a collective fund balance of \$250,000 must be reached within 24 months.

For your clients, creating their new fund at CCF is as simple as completing a form. They can contribute securities, cash or other assets acceptable to CCF, or they can grant assets from a private foundation or a donor-advised fund (DAF) held elsewhere.



SIMPLE GIVING FOR YOUR CLIENT

- **S**trategic giving that can make a long-term impact
- **I**nformed giving that is guided by the desires of your client, the needs of the community, and the knowledge of nonprofits addressing the issues most important to that client
- **M**aximized giving that utilizes the assets and the techniques that provide the greatest leverage for their charitable dollars
- **P**urposeful giving focused on your client's objectives
- **L**egacy-building giving involving more than just one generation, creating an impact beyond just one generation
- **E**asy giving that can be done online, with an email or a simple phone call



A LOCAL PARTNER FOR YOU

- A local partner who wants to share with you extensive charitable planning and legacy building expertise
- A local partner who is deeply entrenched in Cobb and its immediately surrounding communities, the culture, the needs, and the organizations meeting those needs
- A local partner who wants to help you provide more value to and deepen your relationship with your clients and their families
- A local partner who is committed to helping charitably-minded professional advisors thrive



QUALIFICATION REQUIREMENTS FOR INVESTMENT PARTNERS

- Registered Investment Adviser (RIA) or offering investment advisory services through an RIA, or a bank or trust company
- Client base inclusive of clients who reside or operate a business in Cobb County
- Minimum of \$100 million in assets under management
- Minimum 10 years in business
- Minimum 15 years average investment management experience among key employees
- Investment process consistent with CCF's Investment Policy Statement

A DAF option
combining
personalized,
strategic and
informed giving
with your
investment
management

Discover how Cobb Community Foundation can support your clients' charitable goals. For more information, contact us at CCFTeam@cobbfoundation.com or call 770.859.2366.