

When your client wants you to manage their charitable fund

Certain Community Foundation charitable funds can be managed by independent money managers



The Community Foundation of North Central Massachusetts recognizes that financial planners and investment managers have developed trusted and valued relationships with their clients. When an individual, family, nonprofit or company establishes a substantial fund at the Community Foundation of North Central Massachusetts, there is an opportunity for their investment advisor to continue managing the portfolio.

Benefits

- Financial Planners, Advisors and Investment Managers can help their clients achieve their charitable goals—while maintaining the assets in their practice.
- Your client is able to take advantage of the foundation's grantmaking expertise and software without changing investment advisors.
- It eliminates the need and costly expense of setting up and maintaining a private foundation, which can be a never-ending ordeal.
- Personalized giving. The community foundation helps donors and their advisors structure a charitable fund to satisfy specific charitable goals and tax planning objectives.
- We help simplify charitable giving. Your client can enjoy the benefits of having a foundation without the aggravation. They supply the passion and ideas, you the investment management and the community foundation supplies the expertise and infrastructure that will help your client leave a lasting legacy.

Community foundations provide a simple, powerful, and highly personal approach to giving.

We offer a variety of giving tools to help people achieve their charitable goals. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways we can help your clients achieve their financial planning with charitable giving, contact Linda Mack, Vice President for Development and Donor Services, 978.345.8383, ext., 321 or lmack@cfncm.org.



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There's so much more we'd like you to know about how your Community Foundation can help you achieve your charitable goals. We welcome the opportunity to work with you. Contact Linda Mack, Vice President for Development and Donor Services, 978.345.8383, ext., 321 or lmack@cfncm.org.



Community Foundation of
North Central Massachusetts
649 John Fitch Hwy
Fitchburg, MA 01420
978.345.8383

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Visit www.cfncm.org to learn more
about the Community Foundation

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See Inside For Details



The Community Foundation of North Central Massachusetts is a nonprofit organization serving the charitable interest of donors in 33 communities throughout North Central Massachusetts. Ashburnham, Ashby, Athol, Ayer, Barre, Bolton, Clinton, Devens, Erving, Fitchburg, Gardner, Groton, Harvard, Hubbardston, Lancaster, Leominster, Littleton, Lunenburg, New Salem, Orange, Pepperell, Petersham, Phillipston, Princeton, Royalston, Shirley, Sterling, Templeton, Townsend, Warwick, Wendell, Westminster, and Winchendon.