

Individually MANAGED ACCOUNTS (IMAs)

OUR IMA PARTNERSHIPS ARE A WIN-WIN FOR WEALTH ADVISORS AND DONOR-ADVISED CLIENTS.

Clients can use a donor-advised fund to support the causes they care about, and their most trusted wealth advisor manages their charitable assets after they are donated to their charitable fund.

The fund's assets remain under the advisor's management on their platform, while the investment account will be under our tax ID number for tax purposes.

BENEFITS OF A DONOR-ADVISED FUND:

GIVE



- We accept a variety of gift types, including cash, stocks or other assets like real estate or business interests
- Gifts contributed into our funds are tax deductible. In some situations, donors may avoid capital gains taxes
- Donors may give to their fund at any time

GROW



- Donors may increase their charitable impact by investing their fund through their preferred financial advisor
- Assets in the fund grow tax-free

GRANT



- Distributions from charitable funds may go to any qualified charities, anywhere and at any time
- Use our online fund management tool to recommend grants, make gifts or research giving opportunities
- There are no annual minimum grant distribution requirements



"I enjoy working with the Community Foundation because they are local. Their people are local, their philanthropic perspective is local, and they are a resource not just to donors and professionals in the community, but also to the not-for-profit organizations that serve our community."

— JOHN C. CASTRONUOVO
Senior Vice President, Wealth
Management UBS Financial
Services, Inc.

HOW DOES AN IMA PARTNERSHIP WORK?



CONTACT

www.yourcommunityfoundation.org | 561.659.6800

700 South Dixie Highway, Suite 200
West Palm Beach, FL 33401