



## Your Partner in Charitable Giving Solutions

### Partnering with you and your clients in philanthropy and financial success.

Since 1988, the Montana Community Foundation, Inc. (MCF) has worked tirelessly to create permanent philanthropy and build stronger communities. Our work with donors, charitable organizations and professional advisors plays a critical role in both philanthropic and community development. Since our founding, we have reinvested more than \$41 million in Montana.

One of the most important components of our work is our partnership with professional advisors and their clients. Partnering with us allows you to add a powerful charitable component to your menu of services, enhancing your client relationship. Our charitable solutions offer maximum available tax benefits and the peace of mind that comes from working with a professional organization with unmatched knowledge of Montana and the needs of local communities.

You retain complete control of your client relationships. We're here to support you and your client through every step of the process at the level of involvement that makes sense.

#### **We offer:**

- Expertise and advice identifying your clients' charitable-giving interests and goals
- Help matching charitable and financial goals with the best giving solution
- Creation of custom charitable plans and strategies, maximizing tax benefits
- Charitable giving documents and forms
- Planned giving and estate planning tools
- Partners for Montana's Future (PMF) program with retention of full advisory capacity over assets (see reverse for more information)
- Montana Endowment Tax Credit expertise

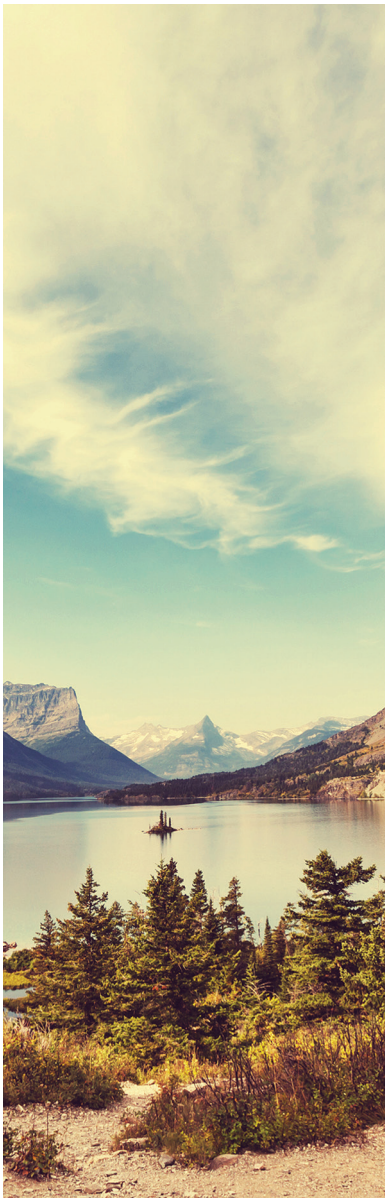
#### **Key Advisor Benefits:**

- Maintain a lifetime relationship with your clients through the management of their fund
- Offer clients a comprehensive plan to achieve their charitable goals and create a legacy for the future
- Provide your clients the opportunity to receive maximum tax benefits on their charitable gifts
- Choose from a variety of options to establish or add to your client's fund (Planned Gifts - CGAs, CRTs, CLTs, IRAs, life insurance)
- Quick and easy fund set-up
- Ability to integrate gift planning with estate planning and business succession planning

“Guard, protect and cherish your land, for there is no afterlife for a place that started out as Heaven.”

— Charles M. Russell





DONOR  
SERVICES

ENDOWMENT  
BUILDING

PHILANTHROPIC  
ADVOCACY

COMMUNITY  
DEVELOPMENT

PLANNED  
GIVING

## Key Client Services:

- Customized grantmaking plans and mission statements
- Expertise on charitable giving, nonprofits and community trends
- A greater impact
- Advice and support from experts in the field
- Ability to designate a future purpose including specific charities, a field of interest or successor advisors
- Streamline charitable donations

As a trusted financial advisor, you have the power to do great things for your clients. If you have a client who has expressed an interest in charitable giving, please contact us and we will help you through the process. It won't take long, but the benefits will last a lifetime.

## Partners for Montana's Future

### Fulfill your clients' charitable goals. Maintain investment advisory capacity.

Through MCF's Partners for Montana's Future (PMF) program, we offer you ways to remain involved in your client's charitable wishes and maintain investment advisory capacity over the assets. If you have clients who are philanthropically minded, our PMF program is a great way for you to help ensure their charitable goals are met while retaining those assets in your investment portfolio.

### The general guidelines for the PMF program include:

- A \$50,000 investment minimum per donor (must be a newly established gift)
- Assets under management from \$50,000 to \$1,000,000 allow for investment in a portfolio of MCF pre-approved funds
- Assets under management greater than \$1,000,000 allow for investment in a portfolio actively managed by the advisor within MCF Investment Policy guidelines
- MCF management fee of 0.25%

### Becoming a third-party manager in the PMF program is simple:

- Review our PMF Program Summary for information on required terms and criteria
- Complete the PMF Program Partner Application for review and initial approval by MCF finance department
- Upon initial approval, complete the PMF Program Partner Letter of Agreement.
- MCF's Investment Committee conducts a final review of your application materials and approves acceptance into the program
- At least one client portfolio must be established within first three years to maintain status as a PMF Program Partner

Interested in becoming a program partner? Please give us a call today, or visit the Advisors section of our website, [www.mtcf.org](http://www.mtcf.org), and select Partners for Montana's Future to access program forms and additional information. We look forward to working with you!

### Contact Us Today

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