



# Announcing the Donor and Advisor Partner Program

## Introduction

For investment advisors, financial planners, brokers and trust officers with clients who have philanthropic intentions, a client's gift to charity may mean that the advisor loses control of those assets. The Oshkosh Area Community Foundation has established a program which allows a local option for advisors to become an investment manager of the Community Foundation and maintain custody of their client's assets. Because most community foundations use only one or just a few advisors to custody and manage assets given for charitable purposes, advisors are often reluctant to refer their clients to a foundation. The philanthropic experience at the Community Foundation, combined with the experience of local advisors, is a winning combination for the donor and the community.

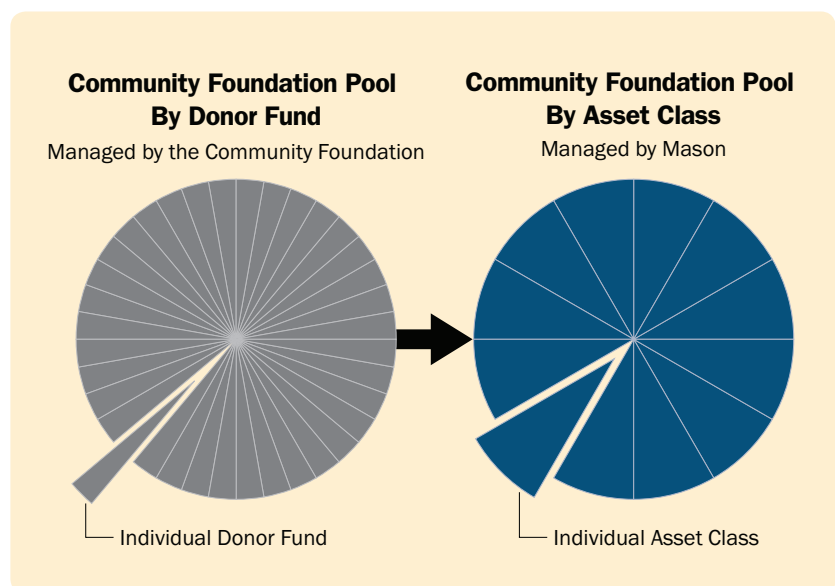
## Your Partners in Client Solutions

We are excited to introduce a unique model for working with multiple local advisors for the greater good of the communities we serve. The Community Foundation recently engaged Mason Investment Advisory Services, Inc. of Reston, Virginia, to assist with this program. Mason is a registered investment advisor with over \$6 billion in assets under management and specializes in managing the assets of community foundations. Many of Mason's community foundation clients maintain relationships with multiple advisors.

In partnership with Mason, local advisors are invited to refer their charitably inclined clients to the Community Foundation to discover the power and potential of their philanthropic dreams. Our goal is to assist advisors in managing the charitable giving of their clients. Mason's role is to assist the Community Foundation in establishing the appropriate asset allocation for the pooled assets of all donors

## Benefits Of Partnering with the Community Foundation

There is a need for those who have wealth to be involved and engaged in their communities and to invest their resources in ways that make a difference. That difference can be made when advisors see philanthropy as a primary element of the guidance they provide to clients.



## Advisor

- Add an extra level of top quality service for your clients by linking them to effective charitable options
- Remain in control of your client relationships

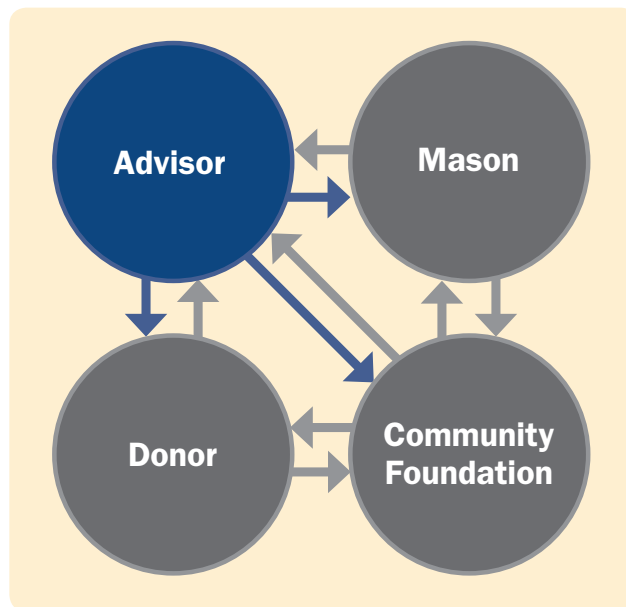
## Donor

- Maintain relationship with trusted advisor
- Obtain maximum federal and state tax benefits and easily match personal charitable interests with tax planning needs
- Gift a variety of assets, from cash and appreciated stocks to real estate and more complicated assets
- Gain access to the Community Foundation's deep knowledge of critical issues affecting our service area
- Choose from a variety of ways to give now or later as part of their estate plans

As a neutral expert in philanthropy, the Community Foundation is the charitable arm of your professional team, supporting you and your clients through every step of the giving process, while you retain complete control of your client relationships.

## How Does the Program Work?

1. Donor creates a new account with their advisor in the name of the Community Foundation.
2. Advisor holds the donor's assets in custody and manages the assets on behalf of the Community Foundation.
3. Mason coordinates with advisor on specific asset classes they will hold.
4. Mason downloads daily activity from each local advisor.
5. The Community Foundation tracks fund value, annual giving and provides reports to the donor.



## Contact

To learn more about this program, please contact Jennifer Sheahan at the Oshkosh Area Community Foundation at (920) 426-3993 or [jennifer@oshkoshareacf.org](mailto:jennifer@oshkoshareacf.org).

**About the Oshkosh Area Community Foundation**

Since 1928, the Oshkosh Area Community Foundation has helped donors turn their charitable investments into projects that add energy and vitality to our community. Serving Winnebago County, Waushara County, Green Lake County and Ripon, the Oshkosh Area Community Foundation strives to advance our communities' quality of life and capacity for excellence.

The Oshkosh Area Community Foundation is a 501 (c)(3) nonprofit organization; it is one of 22 Wisconsin community foundations and nearly 700 national community foundations. The Oshkosh Area Community Foundation has more than 750 charitable funds (supporting arts and culture; community development; children, youth and families; scholarships; education; health and human services; the environment; and religion) contributing to over \$100 million in assets.

To learn more about the Oshkosh Area Community Foundation, please contact Jennifer Sheahan at (920) 426-3993 or [jennifer@oshkoshareacf.org](mailto:jennifer@oshkoshareacf.org).

**About Mason Investment Advisory Services, Inc.**

Mason Investment Advisory Services, Inc., an investment advisor registered with the SEC, is a privately owned firm with a national scope. Mason is devoted to comprehensive investment management and consulting for endowments, foundations and other institutional portfolios and financial planning and wealth management for individuals.

For more information, contact Will Thorpe at (703) 716-6000, ext. 124, or visit [www.masoncompanies.com](http://www.masoncompanies.com).