

## Your Partner in Client Solutions

Philanthropy is our business. **We're here to help.**

### CLIENT BENEFITS

#### **SIMPLICITY**

We know charitable planning can be time sensitive. We help establish funds quickly and efficiently so your clients can grant at their convenience.

#### **FLEXIBILITY**

We accept a wide range of appreciated assets including public securities, real estate, privately held business interests, cryptocurrency, and more.

#### **STRATEGIC SUPPORT**

Our philanthropic advisors create customized giving strategies that match your clients' needs and passions.

#### **COMMUNITY KNOWLEDGE**

We share knowledge of the needs in our local community and help clients find the charities that reflect their values.

#### **FAMILY PHILANTHROPY**

We help families design and manage charitable plans that engage all generations.

### ADVISOR BENEFITS

#### **PARTNERSHIP**

We get to know our partners and seek strong relationships. We're always just a phone call away.

#### **CHARITABLE ADVISING**

We help you navigate your clients' complex charitable giving needs, explore the best giving options and develop plans to make the most effective use of their assets.

#### **NETWORKING**

We are a community of professional advisors and nonprofits who share best practices, grow our network and provide educational opportunities.

#### **INDIVIDUALLY MANAGED FUNDS**

We provide opportunities for you to maintain the investment and stewardship of your clients' charitable assets with OCCF's individually managed funds.



# Individually Managed Funds



At OCCF, we consider professional advisors to be valuable partners in philanthropy. That is why we offer donors the flexibility to recommend an external Investment Advisor to manage the assets of their donor advised fund. This customized investment approach allows donors to work with an Investment Advisor they know and trust, while our expert staff work with these donors to help them accomplish their philanthropic goals.

OCCF donor advised funds with assets over \$500,000 qualify to be individually managed.

## Advisor Benefits

- You remain your clients' trusted advisor, maintaining management of their assets.
- Expand assets under management, converting privately held interests or real estate into charitable assets.
- Access a team of experts in charitable giving.

## How We Work With You



### Step 1:

Your client establishes a charitable fund at OCCF.



### Step 2:

OCCF opens account at advisor's firm under OCCF's investment guidelines.



### Step 3:

Advisor invests and manages clients' charitable fund assets.



### Step 4:

OCCF grants charitable funds per your clients' recommendation.



### Step 5:

OCCF & advisor review fund investment performance annually.

## Who Do I Contact to Get Started?



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