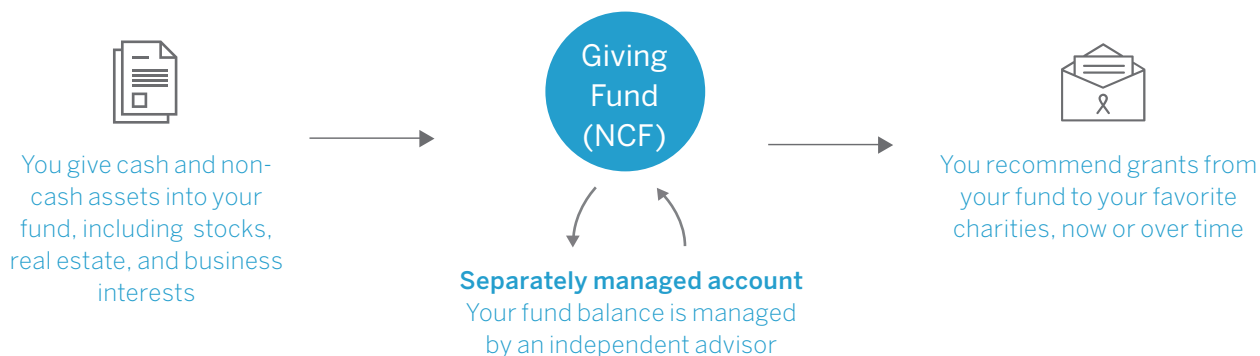


Separately managed accounts

Give your advisor access to manage your fund's investments in order to maximize charitable impact

A separately managed account (SMA) is a flexible investment option that allows your personal advisor to provide investment services for the charitable dollars in your Giving Fund. With an SMA, your advisor has the ability to manage and align your personal financial planning alongside your charitable granting goals for one unified perspective. Overall, SMAs are best suited for givers who have large ongoing fund balances, longer-term charitable giving horizons, and the desire for their fund balance and charitable impact to grow over time.



BENEFITS OF AN SMA

- Customized, flexible investment options for assets in your Giving Fund at NCF
- Continuity between your financial and charitable giving plans from your trusted personal advisor
- Flexibility in creating your own investment goals, with the ability to design unique, custom strategies
- Potential to grow your charitable dollars tax free, for maximum charitable impact

NEXT STEPS

- Connect with your NCF team to discuss whether an SMA is the appropriate vehicle to accomplish your charitable goals. (Your NCF fund must have a minimum balance of \$300,000.)
- Identify your advisor, and NCF will contact them to establish an account.
- Once your SMA is established, your advisor can immediately manage and invest the assets in your fund.
- 5% of your fund balance will be maintained as cash in your fund, so that money is immediately available for granting, as needed.

Learn more or get started today

Visit us at ncfgiving.com or call us at 800.681.6223