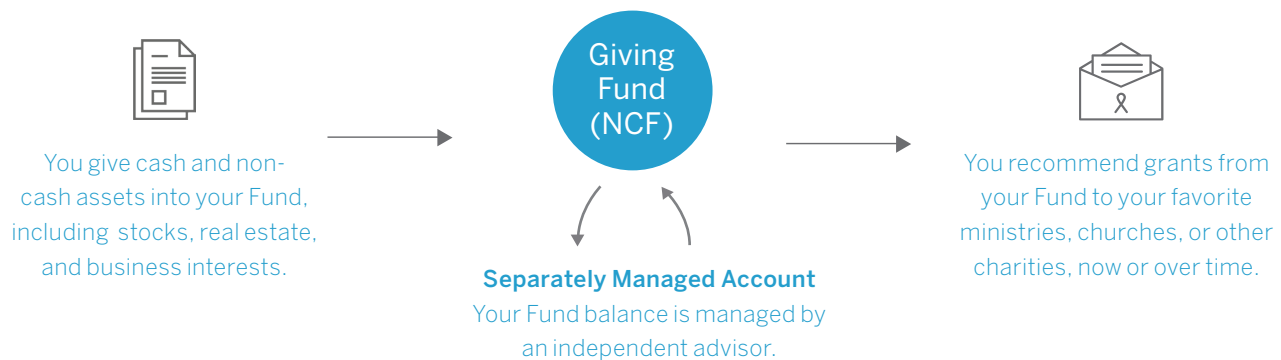


Separately Managed Accounts

Explore a customized investment option at NCF for Giving Funds with balances over \$300,000

For givers with Giving Fund balances of \$300,000 or more, NCF offers the investment option of a Separately Managed Account (SMA). Our SMA offering allows qualified independent investment advisors to provide investment management services for the assets you have contributed to your NCF Giving Fund. With your SMA, your personal advisor can manage and align your personal financial planning with your charitable granting goals for one unified perspective. 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.



ADDED BENEFITS OF YOUR SMA

- Customized, flexible investment options for assets in your Giving Fund at NCF
- Unified personal financial and charitable giving plans, with your own trusted advisor
- Greater ease in rebalancing your giving investment portfolio
- Potential to grow your charitable dollars tax-free, for maximum charitable impact

NEXT STEPS

- You recommend a qualified, independent advisor to manage the assets in your Giving Fund (\$300,000 or more ongoing balance required).
- NCF reviews and qualifies your recommended independent advisor firm.
- If approved, NCF establishes your SMA, and your advisor provides investment management services for your Giving Fund's assets, within approved NCF investment guidelines.
- 5% of your Giving 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.