

Outside Investment Portfolio Management

Community Foundation provides [five investment portfolio options](#) from which our fundholders can choose. However, we understand that you are a trusted advisor to your clients and that this confidence may extend to their charitable giving.

For funds of \$500,000 or more, a donor may recommend an investment manager to the Foundation. Our Investment Committee will consider the recommendation and may seek additional information from the manager. Each investment manager serves at the pleasure of the Trustees of the Community Foundation. Our Investment Committee monitors each portfolio to assess that the assets and returns are appropriate to our investment approach.

Your client can contribute cash or securities to their fund at the Community Foundation, or transfer assets from a private foundation or donor advised fund. We can also accept gifts of non-cash assets, such as real estate and closely held stock.

If you'd like to learn more about this option, please contact Daisy Pereira-Tosado, Director of Philanthropy, 413-417-6383, dosado@communityfoundation.org