

Community Foundation for MetroWest Advisor Managed Program

A Flexible DAF Investment Offering for You and Your Clients

We understand that when helping your clients achieve their philanthropic goals, flexibility and the ability to remain actively involved in managing their donor advised fund (DAF) are essential. At the Community Foundation for MetroWest (CFMW), our goal is to provide not just a product, but a thoughtful, high-quality experience that reflects positively on you and your practice.

Our Advisor Managed Program is designed to strengthen your role as a trusted partner, allowing you to remain closely engaged with your clients while serving in a fiduciary capacity for the investment oversight of their donor advised fund assets. The program enables you and your clients to align philanthropic investments with the broader portfolios you already manage, creating a more integrated and thoughtful approach to their overall financial and charitable goals.



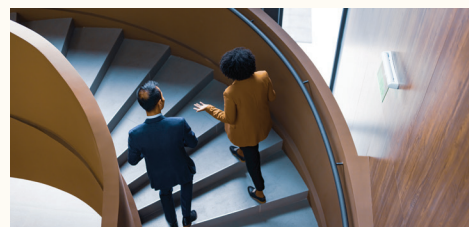
Program Minimum

Donor advised funds with a minimum initial contribution of \$500,000 are eligible to nominate a third-party registered investment advisor to manage their DAF assets outside of CFMW's standard investment pool options, in accordance with the CFMW Advisor Managed Program Investment Guidelines.



Advisor Nomination Process

To proceed, the donor must complete a Professional Advisor Managed Program Application. CFMW will coordinate the review and approval process with its Investment Committee and Board of Trustees. As part of this process, advisors will be required to outline key details, including the proposed management fee for the applicable DAF account(s).



Continued Partnership

The CFMW team will work closely with you to ensure donors and advisors benefit fully from our deep philanthropic expertise. We offer tailored support to you and your firm, or we can work directly with your clients, always with the goal of delivering a white-glove service experience and personalized philanthropic guidance.

The most meaningful philanthropy is built over time, through listening, learning, and shared experience. CFMW is proud to partner with individuals and families who want their giving to reflect both purpose and possibility.

Learn more about Donor Advised Funds at metrowestdaf.org, or contact: Caroline Murphy, Vice President of Advancement and Philanthropic Services, at 508-720-4443 or philanthropy@communityfoundationmw.org



Your Generosity. Amplified.