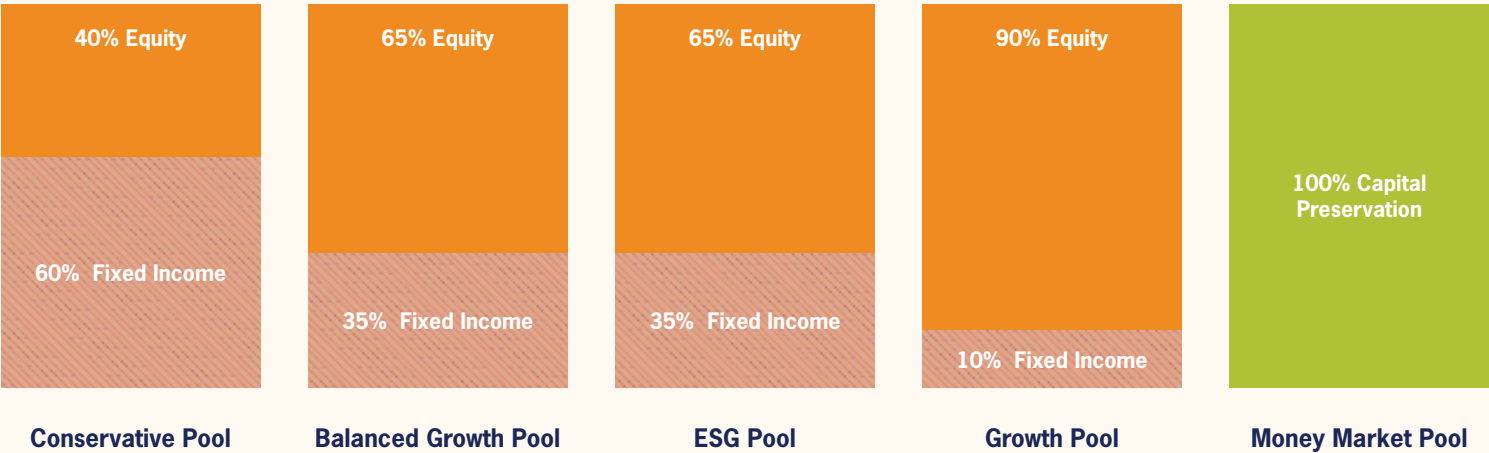


Investment Options for Donor Advised Funds

The Community Foundation for MetroWest (CFMW) knows each donor has unique philanthropic goals and provides an investment strategy that works best to achieve them. CFMW offers different investment pools to choose from, all of which are monitored and guided by our Investment Committee. This Committee is comprised of investment professionals and leading community experts, who regularly review the performance of the investment pools and makes necessary changes when needed. Additional details on our Investment Committee can be found on the back.

Standard Investment Pool Options

For any DAF account at CFMW, fundholders and their advisors can select an investment pool that aligns with the fundholder’s risk tolerance and time horizon for giving.



Advisor Managed Program

For DAF accounts with \$500,000+ in assets, the fundholder can nominate a third-party RIA to manage the funds outside of the traditional pools, subject to review and approval by CFMW and its Investment Committee. Advisors can assess a management fee agreed upon with the client for the DAF.



Work with Your Client To Define an Investment Strategy for their CFMW DAF



Ensure Proposed Investment Allocation is in line with CFMW’s Advisor Managed Program’s Guidelines



Invest the assets to further the impact and vision of your client’s philanthropic giving.

Investment Committee

John DeSisto, Chair (Needham)

John has worked in the investment management field since 2000. He is the former CIO at The Yawkey Foundation and previously was a Director in the Boston University Investment Office. John lives in Needham with his wife and three daughters.

Rose Carpenter (Wellesley)

Rose joined Wellesley College in September 2009 and serves as Deputy CIO. Before joining Wellesley, Rose was an associate at HarbourVest Partners where she focused on U.S. primary partnership investments. She had previously been a consultant at Investor Group Services (IGS) in Boston. Rose received a bachelor of arts degree from Dartmouth College and an M.B.A. from the Tuck School of Business at Dartmouth, where she graduated as an Edward Tuck Scholar with Distinction.

Katharine Delaney (Needham)

Katie is a partner and portfolio manager in Brown Advisory's Boston office. She manages customized investment portfolios for family offices, foundations, and private clients. Prior to joining the firm, Katie was a managing director at Cambridge Associates in Boston, where she advised family offices, endowments and foundations on asset allocation and manager selection across all asset classes. Prior to Cambridge Associates, she was a summer associate in the hedge fund group Blackstone Alternative Asset Management within the Blackstone Group in New York. She began her investment career at BNY Mellon Private Wealth Management in Boston, as a member of a portfolio management team advising family clients on asset allocation and wealth planning.

Robert A. O'Neil, Jr. (Concord)

Robert is a Founding Principal of Birch Hill Investment Advisors LLC, a wealth management firm based in Boston. He is active in his local community as a member of the investment committee of the Louisa May Alcott Memorial Association and Emerson Hospital, where he serves as Corporator and Vice-Chairman of the Investment Committee.

Robert Rands (Westwood)

A current Foundation for MetroWest Trustee, Robert has worked in the investment management field since 1966. He was portfolio manager for a portion of Vanguard® Morgan Growth Fund and retired as senior vice president of Wellington Management Company.

James S. Rider (Medway)

James is the Corporate Treasury Manager for MathWorks, Inc., responsible for the company's investments and global cash management. Prior to joining in 2001, he spent 15 years in the financial services industry in various corporate treasury and investment management roles.

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.**