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## *An Advisor's Guide to Investment Management Opportunities for NHCCF Giving Funds*

It's all about options. It's about flexibility and opportunities to grow your clients' Giving Funds. At New Hope Christian Community Foundation (NHCCF), we believe in providing maximum flexibility for our donors – your clients – by adding multiple investment opportunities for their Giving Funds. We look to you, as their investment advisor, to be involved in the investment management and growth of the Funds. You have several ways to be involved.

### *1. Advise your client on their choice of Investment Pools*

For a Giving Fund balance under \$300,000, NHCCF offers five pooled investment accounts ranging from money market to aggressive growth. These pools are actively managed in a socially responsible environment. NHCCF may pay relationship management fees to you, the investment advisor, for:

- Providing charitable counsel to current and prospective NHCCF donors
- Advising donors on contributions options to their Giving Fund
- Selecting the investment pool for assets in their Fund
- Planning grants from the Fund

Once your total client base in the pool environment has reached \$300,000, NHCCF may pay a relationship management fee to you. This amount (.25% annual compensation) is paid quarterly in arrears and is based upon the quarter-end balance of the aggregated funds.

### *2. Manage the Giving Funds balance directly*

For a Giving Fund balance over \$300,000, you may advise, manage and direct the investments of the Fund. In this case, NHCCF enters into investment advisor relationship with you as a Registered Investment Advisor. NHCCF may pay you investment management fees for:

- Gift assistance and processing
- Reporting
- Providing necessary liquidity to meet distribution needs of the fund
- Designing and implementing an investment strategy which you agree upon with your client
- Investment Transactions

NHCCF will supply you with our Master Investment Policy, which provides guidelines for investments. NHCCF executes the investment agreement with your firm after approval of the new Giving Fund and its investment strategy. Quarterly fees may be deducted directly from the brokerage accounts. Balances under \$1,000,000 are required to be maintained with NHCCF's master custodian.

**To learn more about NHCCF investment options, please contact us at 419.873.4673, 842 W. South Boundary Street, Perrysburg, Ohio 43551, or [www.nhccf.com](http://www.nhccf.com).**