



FINANCIAL ADVISORS



THE POWER TO STAY INVOLVED

For nearly 70 years, The Pittsburgh Foundation has been helping financial advisors set up endowment funds for their clients that have a lasting impact on the community.

We now can offer you ways to remain involved in your client's charitable wishes and maintain investment advisory capacity over their assets.

You will have a team of experienced philanthropic advisors on hand to take the burden of administration off of you, plus an array of exclusive support services from The Center For Philanthropy.

Key Advisor Benefits:

- Maintain a lifetime relationship with your clients through the management of their fund
- Offer clients a comprehensive plan to achieve their charitable goals and create a legacy for the future
- Provide your clients the opportunity to receive maximum tax benefits on their charitable gifts
- Choose from a variety of options to establish or add to your client's fund (Planned Gifts - CGAs, CRTs, CLTs, IRAs, life insurance)
- Quick and easy fund set-up within 24 hours
- Ability to integrate gift planning with estate planning and business succession planning
- Enjoy an array of exclusive support services for advisors such as continuing education, seminars, site visits and client appreciation events

AND DO GREAT THINGS FOR YOUR CLIENTS

Give your clients the confidence of knowing their legacy is secure in the hands of leading experts in philanthropy and their investments are sound with your oversight and management.

Key Client Services:

- Access to The Center For Philanthropy and professional staff of advisors to facilitate grantmaking, family meetings, specialized site visits, program-based seminars, volunteer experiences, and more
- Customized grantmaking plans and mission statements
- Local, regional & national expertise on charitable giving, nonprofits and community trends
- "Giving Circles" that allow for collaborative opportunities for clients to join like-minded philanthropists and make a greater impact
- Advice and support from experts in the field, including: Children, Youth and Families; Education; Arts and Culture; Social Justice; Civic Design; Community Development, and the Environment
- Ability to designate a future purpose including specific charities, a field of interest or successor advisors
- Streamline charitable donations
- Make grants domestically and internationally



ADVANCING CREDENTIALS AND YOUR CAREER

The Pittsburgh Foundation is partnering with the American College of Financial Services in Philadelphia to offer group study and peer support in the Chartered Advisor in Philanthropy designation to local financial advisors. The course is the first of its kind in Western Pennsylvania and is designed to give advisors a body of knowledge and credentials to better serve their client's philanthropic goals in the community. These graduate-level courses qualify you for continuing education credits and can be applied towards a Master of Science in Financial Services degree.

Gain a deeper understanding of:

- Cross-generational engagement and stewardship
- Next generation and successor advisor education
- Investment advisor training and outreach
- Consulting for local private foundations (grantmaking, sunseting and terminating services)
- Legacy Planning
- Family meeting facilitation
- Philanthropic planning
- Tax tools and techniques

IT'S TIME TO DO GREAT THINGS

As a trusted financial advisor, you have the power to do great things for your clients. If you have a client who has expressed an interest in charitable giving, please contact us and we will help you through the process. It won't take long, but the benefits will last a lifetime.

Become a Third Party Manager:

- Review our Investment Policy and complete the Due Diligence Questionnaire
- The Pittsburgh Foundation reviews and presents Due Diligence to Investment Committee for approval
- Our official approval is contingent upon your client establishing a fund with The Pittsburgh Foundation
- Once fund is established, we can help you develop joint marketing materials

Interested in becoming a third party manager?

Call 412-394-2653 or visit us at pittsburghfoundation.org.



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A copy of the official registration and financial information for The Pittsburgh Foundation may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1.800.732.0999. Registration does not imply endorsement.