



WHAT IS THE INDIVIDUALLY MANAGED ACCOUNT PROGRAM (IMA)?

Our IMA program is a win-win for you and your clients. Your client can use a donor advised fund to support the causes they care about, and you can manage your client's charitable assets after they are donated to the fund. Both you and your clients will have access to a knowledgeable staff of professionals who empower donors to become organized and efficient philanthropists.

BENEFITS OF A DONOR ADVISED FUND

GIVE

- > We can accept a variety of gift types including cash, stocks or other assets like real estate or business interests.
- > Gifts contributed into our funds are tax deductible. In some situations, they may avoid capital gains taxes.
- > Donors may give to their fund at any time.

GROW

- > Donors may increase their charitable impact by investing their fund through their preferred financial advisor.
- > Assets in the fund grow tax free.

GRANT

- > Distributions from charitable funds may go to any qualified charities, anywhere and at any time.
- > Use our online fund management tool to recommend grants, make gifts or research giving opportunities.
- > There are no annual minimum grant distribution requirements.

“ MY CLIENTS HAVE A PASSION FOR MAKING A POSITIVE DIFFERENCE THROUGH THEIR CHARITABLE GIVING. THE COMMUNITY FOUNDATION CONNECTS THEIR PASSION WITH PURPOSE. I RELY ON THE COMMUNITY FOUNDATION AS A TRUSTED RESOURCE TO PROTECT THEIR CHARITABLE INTENTIONS. ”



- Jennifer K. Wright, CFP®
EdwardJones | Financial Advisor

HOW DOES IT WORK?

- > The Community Foundation conducts a due diligence process on new accounts including asset allocation review.
- > Once approved, the Community Foundation opens a new corporate account with the investment firm.
- > A new donor advised fund is opened in 10-20 minutes and is ready to receive charitable donations.
- > Assets are then transferred to the investment firm to manage (managers collect investment fees and post returns net of these fees).
- > The Community Foundation administers grants from the fund to your client's preferred charities (local or national).
- > The Community Foundation will notify the investment firm of grants distributed from the fund on a quarterly basis.
- > The donor and the investment manager have online access to the donor advised fund.
- > Your client may also use their fund for the charitable component of their estate gift thereby necessitating the need for the investment manager to manage their assets after they pass.



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