Rhode Island
Foundation

Advisor Managed Funds

Advisor Managed Funds are a customized investment strategy that enables a donor to establish charitable funds at the Rhode Island Foundation that are managed personally by a donor's investment advisor. For donors who have deep relationships with their wealth advisors, this strategy allows them to maintain those connections while working directly with the Rhode Island Foundation to accomplish their charitable goals. Wealth advisors maintain investment management over assets while opening up their clients' portfolios to other charitable giving and social investment opportunities.

Your Financial Expertise + Our Community Knowledge = Greater Philanthropic Impact

BENEFITS

For Advisors

- Retain management of charitable assets and strengthen client relationships
- Deepen client confidence by partnering with a trusted community institution
- Support multi-generational family philanthropy and legacy planning
- Differentiate your practice with a comprehensive philanthropic offering
- Gain access to Foundation events, programming, and community expertise

For Donors

- Work with an investment advisor they already know and trust
- Receive maximum charitable tax advantages
- Avoid the administrative burden of establishing a private foundation
- Receive personalized service from the Foundation's charitable giving experts
- Access the Foundation's extensive array of philanthropic programming and giving options
- Maintain anonymity in grantmaking if desired

HOW IT WORKS

For new funds of over $500,000, the Rhode Island Foundation will consider requests for participation in the Advisor Managed Fund program. At your client's request, and upon approval through our due diligence review and onboarding process, you will maintain investment management of the donor's fund and the Foundation will provide administration, community expertise and other philanthropic services.

TO LEARN MORE, CONTACT

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