

# Individually Managed Funds

At OCCF, we consider professional advisors to be valuable partners in philanthropy. That is why we offer donors the flexibility to recommend an external Investment Advisor to manage the assets of their donor advised fund. This customized investment approach allows donors to work with an Investment Advisor they know and trust, while our expert staff work with these donors to help them accomplish their philanthropic goals.

OCCF donor advised funds with assets over \$500,000 qualify to be individually managed.

## Advisor Benefits

- You remain your clients' trusted advisor, maintaining management of their assets.
- Expand assets under management, converting privately held interests or real estate into charitable assets.
- Access a team of experts in charitable giving.

## How We Work With You



### Step 1:

Your client establishes a charitable fund at OCCF.



### Step 2:

OCCF opens account at advisor's firm under OCCF's investment guidelines.



### Step 3:

Advisor invests and manages clients' charitable fund assets.



### Step 4:

OCCF grants charitable funds per your clients' recommendation.



### Step 5:

OCCF & advisor review fund investment performance annually.

## Who Do I Contact to Get Started?



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