

Medallion Investment Partners Program

The Community Foundation of Anne Arundel County (CFAAC) recognizes that the pooling of invested assets reduces administrative and investment-related expenses, allowing more money to go towards benefiting the social sector. A donor may wish to recommend that their contributed assets be invested outside of our pooled investments. For this reason, CFAAC has established certain guidelines for situations when a donor wishes to recommend a specific investment manager or management firm (Donor-Directed Advisor) to hold his or her donated assets.

CFAAC's **Medallion Investment Partners Program** gives donors the opportunity to establish Donor Advised Funds (DAF) at CFAAC, while having a qualified advisor of their choosing continue to manage the assets and receive investment management fees. Medallion status is awarded to investment advisors/firms that pass an annual due diligence review undertaken by CFAAC's Asset Management Committee. Medallion funds are separately managed, non-aggregated funds that receive their own investment return. CFAAC may charge a modest additional annual fee to the DAF for this service in addition to management fees charged to each DAF fund to cover the cost of administering the fund's grantmaking.

The minimum amount to start a DAF in the Medallion Investment Partners Program is \$500,000 with at least half of the beginning balance designated as endowed. The minimum amount required to start an endowed, non-Medallion fund is \$25,000.

The Medallion Investment Partners Program is only available for new gifts, however, existing funds managed under the program may continue to receive additional and/or planned gifts. Current DAF assets are not eligible to be managed by a Donor-Directed Advisor.

MEDALLION LEVELS:

GOLD MEDALLION

A Medallion Partner currently managing CFAAC funds.

SILVER MEDALLION

A Medallion Partner with a Planned Gift Agreement to manage CFAAC assets.

BRONZE MEDALLION

A Medallion Partner not currently managing assets but has passed the due diligence process by CFAAC.

DONOR EDUCATION

The Medallion Investment Partners Program information is posted on the CFAAC website under the "Individual & Families" and "Professional Advisors" pages. Each Medallion Partner may, if desired by the Partner, have the firm's logo posted on both of the pages. Additionally, brochures, handouts, and social media posts will include the Medallion Partners logos where appropriate.

Chief Investment Officer Firm



Mason Investment Advisor Services, Inc. has been selected as the investment manager by CFAAC's Asset Management Committee based on an analysis of performance and a review of investment philosophy, investment process and personnel. www.masoncompanies.com

Care. Connect. Contribute.