



A Customized Investment
Solution with the
California Community Foundation

if you want to

- Have your trusted advisor **customize** how assets are invested
- Be more **strategic** with your charitable giving
- Have **access** to deep philanthropic resources and services

then the **ChAMP** investment option at the California Community Foundation is for you.

ChAMP, which stands for **Charitable Asset Management Partnership**, is a custom investment option for your charitable fund or foundation at the California Community Foundation (CCF), where you recommend your investment advisor to manage the assets.

You may also select one of CCF's investment pools, benefitting from CCF's proven track record and leveraging pooled assets for diversified investments.

INVESTMENT OPTIONS AT CCF

	CAPITAL PRESERVATION POOL	SHORT DURATION BOND POOL	CONSERVATIVE BALANCED POOL	ENDOWMENT POOL	SOCIAL IMPACT ENDOWMENT POOL	ChAMP
TIME HORIZON	Short Term	Short Term	Intermediate Term	Long Term	Long Term	Designed and managed by advisor
GRANTMAKING FREQUENCY	High	High	Moderate	Low to Moderate	Low to Moderate	Designed and managed by advisor
INVESTMENT PRIORITY	Preserve principal and provide liquidity	Preserve principal and provide liquidity through a bond portfolio	Moderate exposure to total return over an intermediate time horizon	Long-term growth and preservation of real purchasing power	Long-term growth with socially-responsible investments	Designed and managed by advisor
INVESTMENT MANAGEMENT	CCF's investment committee, City National Bank and others	CCF's investment committee and select mutual fund managers	CCF's investment committee and select mutual fund managers	CCF's investment committee and select investment managers	CCF's investment committee and PAX World Balanced Fund	Designed and managed by advisor

WHO USES ChAMP?

- Those with at least \$500,000 to start a charitable fund or foundation
- Those who want their preferred, trusted financial advisor to manage charitable dollars
- Those who desire the benefits of a private foundation without the hassles and with more privacy
- Those who seek greater breadth and depth of services and expertise to increase the efficiency and impact of their philanthropy

HOW IT WORKS

1

Recommend Your Advisor to CCF

- You request the ChAMP investment option and recommend your preferred advisor.
- Your investment advisor submits an investment policy statement appropriate for your fund or foundation to CCF for review and approval.

2

Establish Your Fund

- Make an initial irrevocable contribution of \$500,000 or more (complex, illiquid gifts are accepted).
- Potentially qualify for an income tax benefit for contributions and avoid capital gains taxes on appreciated assets held for more than one year.

3

Make a Difference

- You recommend grants from your fund be made to 501(c)(3) organizations in the U.S. or similar public charities globally, as frequently as you wish.

- Your investment advisor manages your investments in a separate account subject to CCF oversight.
- CCF provides nearly a century of expertise in all areas of grantmaking, with special insights into the needs and nonprofits that make Los Angeles unique.

THE CCF DIFFERENCE

CCF creates customized, personalized foundations for you, your family or your company that reflect the ideas, passions and causes that make your philanthropy unique.

These foundations are more efficient and more private than a private foundation – and you get much more than meets the eye.

You get philanthropic planning from the best in the business, who can help you with developing your mission, involving your family and making your legacy meaningful. You can give flexibly with no annual minimum giving percentage or dollar amount.

You can focus on the grantmaking, because we take care of the compliance, due diligence, IRS filings, audits and reports.

You receive the benefit of grantmaking professionals in Los Angeles to help you give anywhere you'd like – from Altadena to Antarctica. You get the assurance that we will be around for generations to come, protecting your intentions as we have for donors since 1915.

With ChAMP and the California Community Foundation, you'll make an impact – however you choose to define it.

To learn more about **ChAMP**, please contact Vice President of Development & Donor Relations Teresa Mosqueda at tmosqueda@calfund.org, by phone at (213) 452-6298 or visit calfund.org/champ.

The California Community Foundation does not provide legal or tax advice. Your particular circumstances may alter the general information provided above, resulting in a different outcome for you. Consequently, you should consult your tax advisor to properly determine the tax consequences of making a charitable gift to the California Community Foundation. Contributions to the California Community Foundation represent irrevocable gifts subject to the legal and fiduciary control of the foundation's board of directors.

ChAMP funds are assets of the California Community Foundation. As such, the board of directors of CCF has a fiduciary duty to ensure that the funds are managed prudently at a reasonable cost. CCF reserves the right to approve or reject any investment manager, to negotiate reasonable fees and to terminate an investment manager for any reason.

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