Investment Alliance

Your Investment Guidance. Our Philanthropic Expertise. A Seamless Client Experience.

For more than 100 years, the Minneapolis Foundation has served as a resource to charitable individuals, families, and businesses. Working together with advisors like you, we have created charitable solutions that help your clients make positive change across our community and around the world.

By joining the Minneapolis Foundation in an Investment Alliance, you can continue to provide investment management for your clients' charitable funds while enabling them to leverage the Foundation's philanthropic services and support. They can feel comfortable that their charitable assets are being managed according to the investment philosophy they trust while benefiting from the Foundation's knowledge of community issues, network of community partners, and expertise in philanthropic planning.

HOW DOES IT WORK?

#1 You submit a proposal to the Minneapolis Foundation for the management of assets appropriate for the risk tolerance, time horizon, and philanthropic goals of a model charitable portfolio.

#2 Our investment committee reviews your proposal and, subject to board approval, enters into a client service agreement with you to provide discretionary investment management.

#3 Your client establishes, by letter of agreement, a Donor Advised Fund at the Minneapolis Foundation and recommends that the fund be invested in your approved investment strategy.

#4 You provide quarterly statements and performance reports to our investment committee. The Minneapolis Foundation reviews the account for compliance with the approved investment strategy and benchmarks.

WHO IS IT FOR?

- Clients able to create new Donor Advised Funds totaling at least $1 million.
- Clients with existing funds at a national Donor Advised Fund or existing private foundation who could benefit from the philanthropic services offered at the Minneapolis Foundation.
- Clients with existing funds at the Minneapolis Foundation who, in combination with new referrals, have assets of at least $1 million.

WANT TO DISCUSS THIS FURTHER?

Please contact Bill Sternberg at 612.672.3825 or at bsternberg@mplsfoundation.org.

Funds held in an Investment Alliance are assets of the Minneapolis Foundation. All gifts to the Minneapolis Foundation are irrevocable and the Minneapolis Foundation has exclusive legal control over contributed assets. The Board of Trustees of the Minneapolis Foundation has the responsibility to ensure that the assets of the Minneapolis Foundation are managed prudently and at a reasonable cost. The Minneapolis Foundation may terminate an Investment Alliance at any time.