



THE CATHOLIC
FOUNDATION

PROFESSIONAL ADVISOR CHOICE PROGRAM

The Choice program allows individuals to make charitable contributions while maintaining their relationship with a trusted financial advisor. The financial advisor will continue to manage donated funds, but are required to invest in predetermined mutual funds that comply with The Catholic Foundation's Investment Policy. This program begins with contributions at \$50,000 or above, including in-kind conversions.



Frequently Asked Questions

HOW ARE YOU DIFFERENT FROM THE COMMERCIAL GIFT FUNDS?

The professional staff at The Catholic Foundation supports the needs throughout the parishes, schools, and ministries in our Diocese. We offer personalized assistance in the areas of giving and grantmaking. Investments are aligned with Catholic beliefs through a screening of holdings.

WHAT IS THE ADVANTAGE OF THE CATHOLIC FOUNDATION OVER A PRIVATE FOUNDATION?

The Catholic Foundation offers expertise, a network of professional legal, investment and tax advisors in addition to facilitating the administration of the fund. The ongoing administration of a private foundation is typically more costly and time consuming than having a fund at The Catholic Foundation.

HOW DOES THIS PROGRAM BENEFIT ME, THE ADVISOR?

The Professional Advisor Choice Program benefits everyone involved. Financial advisors can:

- Coordinate charitable giving to help clients achieve their charitable intentions
- Continue to manage the assets contributed by their clients on their firms' investment platforms
- Convert non-managed client assets, such as real estate, loosely held interests, businesses, personal property and art into charitable dollars that the advisor will manage
- Offer clients a value-added service by connecting them to some of the best charitable giving products and services on the market

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Frequently Asked Questions (continued)

CAN YOU HELP ME/MY CLIENTS DONATE COMPLEX ASSETS?

Yes, charitable giving encompasses more than just cash donations. You and your clients can utilize our expertise to quickly and easily donate complex assets, such as:

- Gifts of real estate – personal residence, commercial property, farmland, or undeveloped property
- Gifts of business interests – closely held stock (SCorp, CCorp, LLC) and partnership interests
- Gifts of personal property – artwork, royalties, copyrights, patents, and valuable collectibles
- Other alternative asset gifts – life insurance policies, retirement plans, negotiable instruments, oil and gas interests, and private equity

HOW CAN THE FOUNDATION FIT INTO MY CLIENTS' ESTATE PLANS?

We can work closely with you and/or your clients to help facilitate planned gifts of all types through your client's estate plans.

DOES THE FOUNDATION SERVE AS TRUSTEE OF CHARITABLE REMAINDER TRUSTS OR CHARITABLE LEAD TRUSTS?

Yes. Call 614-443-8893 to learn more.

WILL I HAVE TO PAY A FEE TO WORK WITH YOU?

No. And furthermore, we offer many additional benefits to members of our Professional Advisors Group, such as networking, client referrals, and continuing education credit opportunities.

HOW DO I GET MY CLIENTS STARTED?

Contact Scott Hartman at 614-443-8893 or shartman@catholic-foundation.org.



Let's talk

About Us

The Catholic Foundation's mission is to inspire giving and assist donors to provide for the long-term needs of the 23-county Diocese of Columbus. The Catholic Foundation is one of the oldest and largest Catholic foundations in the country, distributing nearly \$150 million throughout the diocese since 1985.

Why Us

The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.

