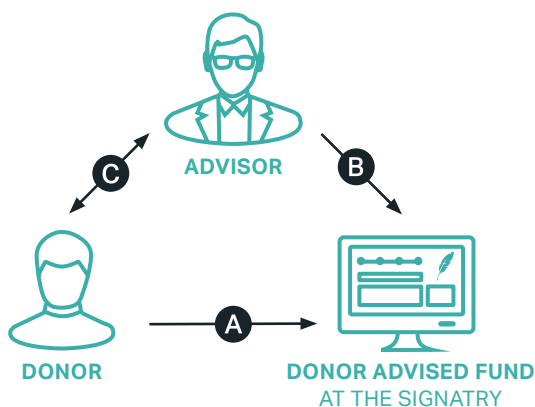


Separately Managed Accounts

How do you differentiate your financial advisor practice in a market that is increasingly competitive? Charitable giving can be a key way to diversify your offerings and amplify your practice. Separately managed accounts (SMAs) are one of the giving tools that allow you to maintain management of investments and connect with your clients on the things that matter. There is a world of possibility here to grow relationships and create impact.

How does the Separately Managed Account relationship work?



- A** The donor creates a donor advised fund with The Signatry and recommends you as the investment manager of the fund.
- B** We will work with you to open an investment account in The Signatry's name on behalf of the donor advised fund. You will then be able to charge your investment advisory fees to the account.
- C** You will maintain your relationship with the donor and have the ability to report the DAF assets along with any of their other assets in their portfolio under your management.

The Benefits of SMAs with The Signatry

+ No minimums. Manage from the first dollar.

Most foundations require large minimum account balances before advisors can manage their clients' donor advised funds. We allow advisors and their clients the flexibility to have their donor advised fund managed from the first dollar.

+ Use your preferred custodian.

From major national brands to boutiques, we work with a wide range of custodians to serve you and your clients' investment goals.

+ Utilize flexible investment options.

You can use a wide range of investment options, including stocks, bonds, mutual funds, ETFs, cash, and more. Alternative investments are allowed subject to approval.

+ Connect to like-minded community.

Your clients can rest assured they will be giving in a community that aligns with their own values, as The Signatry is committed to biblical values and solving problems in the world.

Join The Signatry

Founded in 2000, we have facilitated over \$3.5 billion in contributions and \$2.7 billion in grants through the generosity of our donors and the advisors in this community who advance their clients' charitable goals. Together, we are creating Kingdom impact through revolutionary generosity.

Learn more about how The Signatry supports advisors and fuels creative giving:

www.thesignatry.com/advisors | investments@thesignatry.com | 913.310.0279