

How can you help build a stronger community?

You & Your Clients

You help your client make a gift to the Kalamazoo Community Foundation.

Kalamazoo Community Foundation & American Funds®

We deposit like assets into AF's Balanced Fund and track the funds under your name when gifts total \$50,000 or more.

You can help build a stronger community, help your clients, and still retain investment income fees from the portfolios you manage.

When you help your clients make a gift to us, we will track the gifts under your name. When one or more of your clients have made gifts totaling \$50,000 or more, we will deposit like assets into the American Funds Balanced Fund (70/30 asset allocation). You will receive one percent* commission on the money given. In addition, you will receive .25 bp annually for renewals that will grow as the funds invested appreciate over time.

*1% on up to \$4 million invested; .5% on \$4 million and above.

A Stronger Community

We all partner with each other to make life in Kalamazoo County better for all.

We want to be a resource for you so you can help all of your clients — not just the very wealthy — understand the many ways they can help build a stronger community. Because we are a local organization with nearly 100 years of community knowledge, we have a unique understanding of Kalamazoo County's needs and the many ways your clients can make an impact. We are well positioned to ensure that every gift your client makes is not only the right gift at the right time, but is also personal, meaningful and fulfilling. Visit www.kalfound.org to learn more about how we work with professional advisors, or contact a member of our Donor Relations team.

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