

PROFESSIONAL INVESTMENT ADVISOR PROGRAM

The Community Foundation of Mississauga's Professional Investment Advisor Program (PIA) allows your clients to establish a charitable fund with the Community Foundation of Mississauga while you continue to manage their assets.

Partnering in our Professional Investment Advisor (PIA) Program is simple:

Minimum: partners join the program with a minimum initial investment of \$500,000 which can be from one or more donors.

Asset Allocation: partners must adhere to the Community Foundation of Mississauga's asset mix guidelines as outlined in the Foundations Investment Policy Statement. They are required to maintain a diversified portfolio in terms of specific securities, geography and type of investment.

Fees: funds invested under professional investment advisors are charged standard fees, in addition to PIA-related investment management fees.

Reporting: professional investment advisors must provide quarterly reports to the Community Foundation of Mississauga's Investment Committee.

Administration: the Community Foundation of Mississauga will maintain accounting for all PIA funds in a separate pool.

For more information, contact:

Glenn Gumulka
CEO, Community Foundation of Mississauga
ggumula@cfofm.org
905-897-8880



15 - 1100 Central Pkwy West, Miss, ON L5C 4E5
p: 905-897-8880 f: 905-897-7509
e: info@CFofM.org w: www.CFofM.org
Charitable #: 892395112 RR0001