



GREATER NORTHWEST KANSAS COMMUNITY FOUNDATION (GNWKCF)

Policy on Non-Segregated Accounts

Donors or advisory committees affiliated with the Greater Northwest Kansas Community Foundation that have not established a segregated account with another professional advisor, shall have their fund(s) invested with the same investment provider as GNWKCF.

GNWKCF periodically evaluates its investment options to ensure alignment with the Foundation's financial goals and fiduciary responsibilities. GNWKCF reserves the right to change investment entities at any time, if deemed appropriate, based on the results of these evaluations or changing market conditions.

Adopted 03/06/14
Reviewed 01/31/18
Updated 02/21/24



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Policy on Segregated Accounts

Donors or advisory committees affiliated with the Greater Northwest Kansas Community Foundation may establish a segregated investment account using an outside financial advisor of their choosing, subject to the following conditions:

Minimum Fund Balance:

A minimum fund balance of \$100,000 is required for the establishment of a segregated investment account.

Selection of Financial Advisor:

Donors or advisory committees have the option to select an outside financial advisor to manage the segregated investment account. This option must align with IRS regulations and other applicable legal requirements.

Compliance with GNWKCF Guidelines:

All segregated investment accounts must comply with the overall investment guidelines set forth by GNWKCF. The selected financial advisor must adhere to the standards and reporting requirements as determined by the Foundation.

Fees and Expenses:

Any fees or expenses associated with the management of the segregated investment account by the outside financial advisor will be posted against the Fund on a monthly basis.

Amendment and Termination:

GNWKCF reserves the right to amend or terminate this policy at its discretion. Any amendments or termination of segregated accounts will be communicated to the respective donors or advisory committees in a timely manner.