



# PARTNERING FOR **CLIENT SUCCESS**

OUR PARTNERSHIP  
WITH **FINANCIAL ADVISORS**

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[thegenerositytrust.org](http://thegenerositytrust.org)



*the generosity trust*

EMPOWERING CHRISTIAN GENEROSITY



# THE PARTNERSHIP

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At The Generosity Trust, we help financial advisors achieve their client's charitable giving desires without disrupting the advisory relationship or assets under management.

We understand the priority of relationships. As a financial advisor, you've earned an important role in your client's life. They've entrusted you with their financial assets. We make it possible for you to help them execute their charitable giving without impacting their assets under management.

Our team is experienced in providing Christians a streamlined way to manage their charitable giving, whether to Christian ministries or other worthy causes. Whether it is cash, stocks, or a liquidity event, we have multiple solutions to help them honor the Lord with their stewardship.

# HOW IT WORKS

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## STEP 1



### *Coordinate Custody of the Assets*

The Generosity Trust will open an account with the brokerage firm where the assets will be held (ex: Schwab).

## STEP 2



### *Transfer the Assets*

Once the assets are transferred, we will issue a receipt for a charitable donation to your client.

## STEP 3



### *Manage the Assets*

As an advisor, you'll retain the ability to make investment decisions on behalf of your client pertaining to these funds.

Your clients will experience the tax advantages of their charitable giving while protecting your advisory relationship and assets under management.

# WHY THE GENEROSITY TRUST?

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***Faithfulness.*** Since 1965, we have been faithful to honor the intentions and desires of our original donor, DMB. We've helped give away close to \$350M in grants to organizations, churches, mission outreaches, and other causes as recommended by our donors.

***Responsiveness.*** We pay donor-advised grants daily. Grant requests submitted before 2:00 PM are distributed the same day to make sure the money gets into the hands of the ministry.

***Service.*** A live person will answer the phone and respond to your inquiries. We even hand-deliver checks when needed. We are a boutique firm large enough to handle all your giving but small enough to be responsive.

***Anonymity.*** Any grant from TGT can go out anonymously, allowing the donor to “hide” behind TGT.

***Access.*** Donors have 24/7 online access to their fund through our secure web portal where they can make donations, recommend distributions, and monitor activity.

***Complicated gifts.*** While we easily handle cash and publically-traded stock gifts, we can also handle a variety of complicated asset gifts like closely-held stock, real estate, and tangible personal property.

***No fees.*** Our basic donor-advised fund, the Giving Fund, has no fees whatsoever and the fees for our managed funds are among the lowest in the industry, a sliding scale based upon the size of the asset base.

***Grant Distribution.*** We make donor-advised grants to a variety of causes around the city and country. Our goal is to assist Christians in their giving, not dictate where that giving goes.

# THE HISTORY

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The story of The Generosity Trust (TGT) is the story of a Christian woman with a bold vision: to be extraordinarily generous with the financial resources God had entrusted to her. Dora Macdellan Brown, affectionately known as Aunt Dora, served on the board of her family's private foundation and encouraged them in a letter "to always remember the definitely Christian faith." Using proceeds earned through her family business, she started her own foundation that would become The Generosity Trust. Her letter has become a guiding principle for our outreach.

Today, The Generosity Trust carries forward Aunt Dora's vision more than 50 years later. We advance the cause of Christ by magnifying the joyful generosity of Christians. We are a donor-driven foundation that provides funds and services to simplify charitable giving for generous Christians.

The legacy of Aunt Dora remains central to our work today as we begin serving a third generation of donors. We partner with people who want to be generous with their financial resources and leave a legacy for years to come.



**[thegenerositytrust.org](http://thegenerositytrust.org) | 423.266.5257 | 345 Frazier Avenue, Unit 205, Chattanooga, TN 37405**

*Note: All investing is subject to risk, including the possible loss of the money in the Fund. Diversification does not ensure a profit or protect against a loss. Past performance does not guarantee future results. This is true regardless of the manager chosen — a TGT manager/fund or your own manager. This has no bearing upon the charitable deduction allowed for your contribution INTO the Fund, but may impact the amount available for future grant making OUT of your Fund.*