



Partnering for *Client Success*

Our Partnership with
FINANCIAL ADVISORS

www.thegenerositytrust.org



the generosity trust

EMPOWERING CHRISTIAN GENEROSITY



THE PARTNERSHIP

As a Christian Financial Advisor, you have a passion for helping clients steward all that God has entrusted to them. We are honored to partner with you to that end. We understand the magnitude of your role as the quarterback in life-changing decisions for your clients. Our aim is to be a helpful teammate as you serve your clients holistically.

TGT provides personal touches that keep your clients feeling confident and assured that they make a difference in the lives of others. We simplify their giving as they support the charities and Christian ministries that mean the most to them – throughout their lives and beyond.

Thank you for your work on behalf of families, their finances, and their support of God's kingdom. It is a privilege to join you on this journey.

HOW IT WORKS

TRANSACTIONAL

STEP 1



Coordinate Custody of the Assets

Your brokerage firm sets up an account in the name of TGT and your client.

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

You and the client will determine the ongoing investment strategy on the account.

TRANSFORMATIONAL

TGT understands the transformational part you play in helping the donor invest the resources God has given them and impact His kingdom. Our role is to help you continue and strengthen your relationship with your client, while honoring the advisory relationship that you have fostered over time.



WHY THE GENEROSITY TRUST?

We are...

Diligent. We excel in responsibly stewarding the gifts and resources entrusted to us.

Aware. We humbly and confidently serve others as we recognize and respond to their needs.

Faithful. We remain dedicated to our founding principles as we build and maintain trust.

Strategic. We make every effort to understand our community as we facilitate generosity.

We provide...

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.

Complex Gift Service. 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 Fee Accounts. 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. Our donors initiate grants to a variety of causes around the city and country. Our goal is to assist Christians in their giving, as they honor God with all He has provided them.

THE HISTORY

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 Maclellan 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 empower generosity. 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.

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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.