



VIRTUOSO

The modern alternative to a private foundation

For some, philanthropy is more than an interest. It's an essential part of who they are. For those with a profound commitment to charitable giving—and significant resources to commit—MCF has established



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Virtuoso is custom-made philanthropy, available to funds of five million dollars and greater. It is the ideal solution for those who would like the structure of a private foundation without the administrative and financial burden.

-  **Investment options.** Partner with your family office to design your investment strategy, or ask MCF's professional Investment Committee to invest the assets on your behalf.
-  **Flexible design.** You may choose to establish an advisory board and have discussions facilitated by your MCF team, or work and make decisions independently, with the support of your philanthropic advisor.
-  **Complex assets.** Virtuoso enables you to leverage a number of assets in order to open your fund or add to it in the future. Virtually any asset can be accepted, including securities, business interests, cryptocurrencies, personal property, real estate or the transfer of a private foundation's assets.
-  **Cost effectiveness.** You will enjoy significantly lower set-up fees and annual administrative fees than those associated with a private foundation.
-  **Tax efficiency.** Gifts qualify for maximum tax benefits, including full deductions for contributions of real estate and closely-held stock. There is no excise tax on investment income and no annual distribution requirement, unlike private foundations.
-  **Family Office of Philanthropy.** Akin to the practice within the wealth management industry, this department was created solely for Virtuoso clients, and provides highly tailored and comprehensive service. This can include in-depth research; access to local, national and global nonprofit leaders; multi-generational family convenings; private site visits and more.
-  **Family involvement.** Virtuoso is an ideal vehicle to create a family tradition of giving or to better formalize a strategic approach to family philanthropy. Funds established for the children of Virtuoso donors are not charged a fee until the assets of the individual fund reach \$100,000.
-  **Global reach.** In addition to complimentary international grantmaking, we can provide knowledge on global issues and organizations.
-  **Private label branding.** MCF's marketing team can develop a brand for your fund, comprising logo and color palette. Your brand can appear on stationery and in communications. Other promotional materials, including a website, can be designed at your discretion.

If you're looking for a way to transform your giving to enjoy more independence, concierge service from a team of experts, maximum tax benefits, and private label branding, please contact a senior member of our team to discuss your options.



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