AMPlify (Asset Management Partnership)

AMPlify (Asset Management Partnership) is a customized investment strategy that enables wealth advisors and their clients to set up charitable accounts at San Diego Foundation that are managed personally by a donor's advisor.

This partnership gives peace of mind to donors who have deep relationships with their wealth advisors, while allowing donors to work directly with San Diego Foundation to accomplish their charitable goals. Wealth advisors maintain management over assets while opening up their clients' portfolios to other charitable giving and social investment opportunities, such as impact investing. In addition, Foundation staff handles all the reporting and administrative needs of the fund.

Wealth Advisor Benefits

- Maintain client revenue and management of their assets
- Convert non-managed assets, such as real estate, into charitable assets under management
- Strengthen client relationships by offering a value-added service
- Receive exclusive invitations to special events with local leaders and donors

Donor Benefits

- First class support from The Foundation's team of charitable giving experts
- Access to local nonprofit experts to maximize your understanding and the impact of donor giving
- New opportunities to give back to the community and leave a legacy for future generations
- Exclusive invitations to special events to meet like-minded donors and leaders

How Does It Work?

1. Wealth advisor contacts SDF about prospective gift(s)*
2. SDF completes due diligence process
3. SDF & wealth advisor establish Investment Policy Statement (IPS)
4. Wealth advisor transfers gift to designated SDF account on advisor's investment platform
5. Wealth advisor executes IPS with maximum transparency, including a monthly report

*$250,000 minimum to open and maintain a fund

How We Can Help

Interested in joining our AMPlify program? Contact Director of Wealth Advisor Relations Jason Rogers at jrogers@sdfoundation.org or (858) 245-1508.