

# Professional Investment Advisor Program

The Mississauga Foundation's Professional Investment Advisor Program (PIA) allows clients to establish a charitable fund with the Mississauga Foundation while you continue to manage their assets.

**Partnering in our Professional Investment Advisor (PIA) Program is simple:**

**Minimum:**

Partners join the program with a minimum initial investment of \$500,000, which can be from one or more donors.

**Asset Allocation:**

Partners must adhere to the Mississauga Foundation's asset mix guidelines as outlined in the Foundation's Investment Policy Statement. They are required to maintain a diversified portfolio in terms of specific securities, geography and type of investment.

**Fees:**

Funds invested under professional investment advisors are charged standard fees, in addition to PIA-related investment management fees.

**Reporting:**

Professional Investment Advisors must provide quarterly reports to Mississauga Foundation's Investment Committee.

**Administration:**

The Mississauga Foundation will maintain accounting for all PIA funds in a separate pool.

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**For more information, contact:**

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