



Rancho Santa Fe
FOUNDATION

Individually Managed Accounts

Your advisor manages the investments.
RSF Foundation manages the charitable
administration and compliance.



Invest your way. Give with ease.



Tailored Guidance

Giving support aligned
with your financial goals
and investment strategy,
coordinated with your
advisor.



Aligned Advising

Seamless partnership
between RSFF and your
investment team to
simplify charitable
planning and execution.



Strategic Planning

Tools and resources that
align your philanthropic
goals with tax strategy,
portfolio preferences,
and long-term giving
plans.



Trusted Partners

Connections to vetted
nonprofits and
community priorities
that help maximize the
impact of your charitable
investments.



Why Choose Us?

Rancho Santa Fe Foundation provides streamlined charitable administration and trusted stewardship while your advisor manages the investments.

- ✓ Trusted Expertise
- ✓ Values Alignment
- ✓ Community Impact
- ✓ Local Insights

Contact Us Today
to Start the Conversation



(858) 756-6557