

TOOLS FOR GIVING

Charitable Funds

Great **giving options**.
Choose the one that's
right for you.



The Community Foundation for Monterey County offers a variety of fund types to choose from:

Donor Advised Funds. You can have ongoing involvement in the use of your gift. You work with our professional program staff, identifying ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most. Your recommendations are submitted to our local board for approval; we then distribute grant dollars.

Unrestricted Funds. Your gift can address ever-changing community needs—including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being—arts and culture, economic development, education, environment, health and human services, neighborhood revitalization, and more. The flexibility of your unrestricted gift enables the Community Foundation's program experts to respond to the community's most pressing needs, today and tomorrow.

Field of Interest Funds. You can target your gift to address needs in an important area of community life. Arts. Environment. Aging. At-risk youth. You identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in the area you select.

Designated Funds. You can direct your gift to a specific nonprofit organization or purpose. Help provide ongoing funding for a senior center, museum, or virtually any nonprofit charitable organization. Nonprofit organizations can use a Designated Fund through the Community Foundation to build their endowment and enhance their ability to accept large and complex gifts.

Scholarships. You can invest your gift in our community's future and show students you care, all with the guidance and personal services of the Community Foundation. You determine the criteria students must meet to receive the Scholarship you establish. With your assistance, students achieve their academic and career-oriented goals—from preschool to postgraduate work.

For more information, please contact the Community Foundation for Monterey County:

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or
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**Establish a fund
in your name**

Any of these funds can be established in your name, or in the name of your family, your organization, or anyone you wish to honor.

All grants distributed from the fund you establish—today and in the future—are then awarded to charities in the name of that fund. It's a great way to always be involved with, and remembered for, your community investment.



Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our professional program staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

More benefits

When you establish a fund at the Community Foundation for Monterey County, the maintenance is left up to us. Our professional program staff continually monitors changing community needs so that you can be sure grants made in the name of the fund make the most impact and create your personal legacy of giving.

You can add any amount to the fund you establish at any time. If you endow your gift, it becomes a permanent community funding resource.

Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to the Community Foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact the Community Foundation for Monterey County at 831.375.9712 or www.cfmco.org.