

Charitable Instruments

A variety of **giving methods** tailored to your unique situation



There are many ways to give to your own fund or to an existing fund of the Community Foundation for Monterey County.

Outright Gift. You can make a gift of cash, stocks, bonds, real estate, or other assets to the Community Foundation for Monterey County. Your charitable gift qualifies for tax advantage under federal law.

Bequest by Will. You can designate a gift or portion of your estate to the Community Foundation for Monterey County and, in some cases, receive a substantial reduction in federal gift and estate taxes. Or, you can name the Community Foundation as a beneficiary of your life insurance policy.

Charitable Gift Annuity. You can make a gift of cash or property to the Community Foundation for Monterey County now, get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life. *The Community Foundation for Monterey County is in the process of developing this giving option.*

Charitable Remainder Trust. You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to the Community Foundation and is placed into a charitable fund you have selected. You receive income tax benefits the year you establish your trust.

Charitable Lead Trust. You can place cash or property into a trust that pays a fixed amount to the Community Foundation for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

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

Dan Baldwin, President/CEO
831.375.9712 x115 / danb@cfmco.org

or
Tobi Marcus, Director of Resource Development
831.375.9712 x126 / tobi@cfmco.org

www.cfmco.org

You receive
personalized
service

Each individual, family, or organization we work with has unique charitable interests... and unique financial circumstances.

We help you make the most of both, so you receive the greatest return on 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.

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 your 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.