



(l to r) Dan Baldwin, President/CEO, Bill Tyler, Susanne Tyler, Greg Chilton, CFMC 2016 Board President

Philanthropy Celebrated

Philanthropy starts with one person's desire to help another.

At the Community Foundation for Monterey County (CFMC)'s annual Celebration of Philanthropy, that spirit was evident as Dan Baldwin spoke about the record grants made possible by unprecedented generosity.

William H. "Bill" Tyler III was named Distinguished Trustee for his support of local nonprofits in the arts, healthcare and education. His lead gift to Montage Health (Community Hospital of the Monterey Peninsula) created the Tyler Heart Institute.

"Bill's philanthropic leadership is a catalyst for inspiring others. He believes that 'everyone can participate in helping others and in helping the community,'" said Greg Chilton, CFMC 2016 board chair.

Tyler described community foundations as a place to customize one's philanthropic vision.

“The CFMC is a design studio that would invite you to pull up a chair at the table. You would be simply amazed at the possibilities.”

—Bill Tyler, CFMC 2016 Distinguished Trustee Award Recipient

We celebrate the generosity of those who use their good fortune to make our communities stronger.

College Futures Scholarships Launched

New program helps students achieve their dreams

We believe that every young person should have the opportunity to pursue their educational, career, and life goals. Earning a college degree is an important step toward achieving those goals. However, too many of our young people with the ability and desire to succeed in college lack the support to do so.

Although 75% of Monterey County high school students aspire to attend college, only 33% are eligible to apply to a four-year public university in California. In some local high schools, that figure is as low as 5%.

Low-income and first-in-the-family students face significant barriers to attend college. Costs are rising faster than incomes, college and financial aid applications are complex, and many students lack the academic and personal preparation to succeed in college.

COLLEGE FUTURES

MONTEREY COUNTY



A New Approach College Futures Monterey County is an initiative of the CFMC designed to help low-income students in Monterey County earn a college degree. The program combines scholarships with college success services to address the financial, academic and personal barriers that prevent students from college attainment.

We are partnering with California State University, Monterey Bay (CSUMB) to expand college success services to more students in Monterey County high schools. Working with CSUMB, we will award need-based scholarships while ensuring that students apply for all public financial aid for which they qualify.

Gifts will be matched The CFMC is a partner in the College Futures Foundation's (CFF) Community Philanthropy for Student Success Initiative, a network of seven community foundations in California working together to increase college attainment. CFF has studied the experience and achievements of more than 20,000 low-income students across the state who received scholarships. The CFF will match your gift so that we can increase our scholarships and services for students with financial need.

To learn more about College Futures Monterey County and how your gift can be leveraged to help more local students complete a college degree, visit www.cfmco.org/collegefutures.



Scholarship Recipient Esteban Barajas, Monterey Peninsula College

“Receiving a scholarship was a big motivation for me. I am extremely grateful.”

Photos on page 1 by Michael Troutman





“ Getting new people who gave \$5. That’s a profound benefit of this program. ”
 —Dan Baldwin, CFMC President/CEO

MC Gives! – Beyond Wow!

Monterey County Gives! 2016 once again shattered all previous totals by attracting \$3.66 million and 4,498 donors, up from \$3.17 million and 4,000 donors in 2015. It was the second year the Monterey Peninsula Foundation was a partner, with a \$200,000 grant. The increase in matching dollars motivated more agencies to reach out for lead challenge gifts of their own. The nonprofits are a huge part of making Gives! successful.

Gives!, a three-way partnership with the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation, has developed into an indispensable year-end giving program that is providing much-needed funds to our nonprofit community.

Funders, donors and nonprofits all join forces to make the community better. The 123 participating nonprofits will receive a pro rata match for each dollar raised. More than \$11 million has been donated by individuals since 2009 to benefit hundreds of local nonprofits.

MC Gives! is a partnership between the Monterey County Weekly, the CFMC and the Monterey Peninsula Foundation. Thanks to Neumeier Poma Investment Counsel, the David and Lucile Packard Foundation, and Cannery Row Company for their generous support. The Monterey County Weekly Community Fund is a donor advised fund of the CFMC.



PRESIDENT’S MESSAGE

Building on Past Performance

An adage in the investment world is “past performance doesn’t guarantee future returns.” The good news is that the CFMC gets to build on past performance, which gives us confidence about future returns. Based on 2016 performance, 2017 should bring strong returns that will continue to improve lives throughout Monterey County. We’re still adding up the numbers, but 2016 set records for both gifts (more than \$34 million) and grants (\$15.4 million). More than 50 new funds were created. We will have surpassed \$209 million total assets. The philanthropic passion of Monterey County never ceases to amaze.

While numbers are fun, they don’t provide the full narrative of how the CFMC created impact in so many areas. The Soberanes Fire devastated 132,000 acres (that’s 206 square miles). Many homes were lost, and many more lives disrupted. Additionally, fragile infrastructure in Big Sur took a beating. Our community donated close to \$1 million to the CFMC’s Soberanes Fire Fund, grants from which have helped families, fire fighters, and rebuilding efforts. As I write this, heavy rains are falling on charred landscapes, so the fund, in 2017, will turn its attention toward assisting with the impact of landslides, erosion and flooding.

2017 will see the full implementation of College Futures Monterey County, a college readiness and scholarship program that has been more than a year in planning. It’s hard to imagine a more important investment than assisting young people in accessing higher education. Those returns will be strong.



President/CEO Dan Baldwin speaks at the 2016 Legacy Society Luncheon

“ 2016 set records for both gifts (more than \$31 million) and grants (\$15.4 million)... The philanthropic passion of Monterey County never ceases to amaze. ”
 —Dan Baldwin

In 2016, the CFMC’s Center for Nonprofit Excellence rolled out a new capacity building program for smaller organizations, Next Steps for Small Nonprofits. A major concern of the donor community is investing in emerging nonprofits, and wondering whether they are sustainable. This program will hit full stride in 2017. The return will be nine nonprofits on a path to being stronger in every phase.

Monterey County Gives!, the year-end giving program done in partnership with the Monterey County Weekly and the Monterey Peninsula Foundation, had its eighth consecutive year of increased giving totals, reaching \$3.66 million. These funds will be distributed in February. This is a guaranteed return on a past performance.

I continually ask myself whether this year-over-year trendline can continue, whether the investment adage will grudgingly prove itself true. Then I think of my own adage: “Impact attracts resources.” So long as we stay focused on facilitating philanthropy for maximum impact, returns will remain strong.

Passing the Torch

Bill and Emmy Reese

Bill Reese, a physicist and former Navy Postgraduate School professor, and Emmy, a visual artist, met in college in Portland, Oregon. Married 58 years, their values influenced one another over time. They didn't want to focus on themselves, but rather the larger society and the world around them.

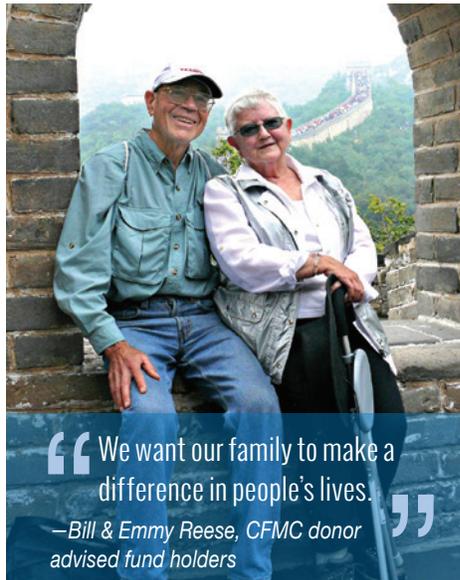
When they were younger, they gave more time than money. Emmy was a counselor with La Leche League and The Childbirth Education League and also volunteered for the SPCA's wildlife rehabilitation program. Bill was president of the local Audubon Society and was part of the core group that successfully campaigned for the establishment of the Monterey Peninsula Regional Park District. They have both been involved in environmental causes for many years.



Reese daughters Ellen and Lark with their families (l to r) Ellen, Ernest and son Xavier; Liana, Daniella, Lark, Amanda and Mike

In 1993 they returned to the Monterey Peninsula after several years in Washington, D.C. They have lived modestly, traveled widely and "had some good luck," accumulating enough resources for a comfortable future. Over the last 25 years, their desire has grown to have "some sort of impact on society into the future," and they set a goal of giving a significant portion of their estate to help others.

Their first major philanthropic commitment was to establish a Charitable Remainder Trust (CRT), a vehicle which enabled them to contribute highly appreciated assets, receive tax advantages and extra income for themselves in their lifetime, and support causes that are important to them. They are pleased that "something good will come out of it."



“We want our family to make a difference in people’s lives.”
 —Bill & Emmy Reese, CFMC donor
 advised fund holders

In 2014, rather than forming a family foundation, they partnered with the CFMC to create the Reese Family Fund.

“We were not keen on taking on the administrative load. We established a donor advised fund so we could achieve our goals and also involve our daughters. We wanted to give them access to philanthropic resources to allow them to strengthen their giving muscles and encourage them in that way.”

They have two grown daughters, Lark and Ellen. Both are busy professionally, and with their families. “They’ve developed similar values to our own, which pleases us very much,” says Bill. He explains “they are full partners in the family fund, each in her own way.”

Bill and Emmy feel it’s worked very well. “I’m a strategic, long-term planner by nature. We wanted to involve the girls to the extent their time and ability allowed to help develop their own philanthropic visions. The fund allows us to take a strategic versus a tactical approach to giving.”

Bill, Emmy and their daughters each recommend one quarter of the grants made each year. Their interests include the environment, human needs, social justice and animal welfare. “We’ve enjoyed it and we hope our girls will pass the torch and involve their children.”

“We’ve had a lot of good fortune. We feel it’s important to at least try to make the world a little bit better. We owe it to society around us to help it along. If you can do some good, do it!”

New Funds Created*

The CFMC manages more than 400 funds established by individuals, families, businesses and nonprofit organizations.

Agency/Stewardship

- Colleagues of the Arts Endowment Fund
- Friends of Carmel Valley Library Stewardship Fund
- Pacific Grove Public Library Foundation Stewardship Fund II
- Stewardship Fund for the Center for Photographic Arts
- Visiting Nurses Association and Hospice Stewardship Fund II

Donor Advised

- Dan Baldwin and Anne Ylvisaker Fund
- Lino and Teri Belli Family Fund
- Sarah and Robert Bouchier Fund
- Fuqua Family Foundation Fund
- Gerosin Fund
- Janzen Family Fund
- Birt and Kathleen Johnson Fund
- Colburn and Alana Jones Foundation
- Richard and Grace Merrill Fund
- Mission Ranches Fund
- Rotary Club of Monterey, Cannery Row
- Laura Sinks Fund
- Gary and Emma Taylor Fund



Birt and Kathleen Johnson

Scholarship

- College Futures Monterey County Fund
- Raymond H. Costa Family Scholarship Fund
- Harold and Peggy Ipson and Dan and Sue Ipson Scholarship Fund

General Endowment

- Clyn & Pamela Smith Fund

Field of Interest

- Fund for Homeless Women Administrative Fund

Designated Fund

- Howard W. and Elva M. Elliott Trust Fund

*Since October 2016

New Legacy Society Members

- Anonymous
- Nancy L. Bartell
- Colburn and Alana Jones
- Benjamin and Mary Ann Whitten

The Legacy Society honors those who included the CFMC in their estate plans. To learn more about planned giving options, please call us at 831.375.9712.



Culvert repair made possible by Soberanes Fire Fund donors

Soberanes Fire Grants Update

Since the start of the fire in July 2016, the Soberanes Fire Fund has awarded 14 grants, totaling \$561,046 to support communities affected by the fire. Most of the funds assisted families who lost their homes, but we've also supported some community-wide projects that will have a lasting impact. The most recent award went to the Coast Property Owners Association to support road repair and replacement of culverts to prepare for winter. There is a deep concern that this vulnerable community will also suffer from serious debris flow and flooding from winter rains.

“ We received a grant to improve our road system to increase safety in potentially lessening the number of road failures/debris flows and washouts this winter. These improvements will help the whole community recover from the Soberanes Fire. We would not be able to do this work without this support.”
—Pam Peck, Rocky Creek Road Association

The Soberanes Fund Grant Committee is monitoring the situation and will continue to deploy resources to help the community rebuild.

For information on grants or to donate, visit www.cfmco.org/soberanesfund.

GRANTMAKING

Community Impact grants make a meaningful difference for many people and communities throughout Monterey County. For more examples of recent grants, please visit www.cfmco.org/grantsandsupport.

Positive Discipline Community Resources \$10,000 for “Parenting for Strong Communities” (Children & Youth)

Helping children grow to be mindful, caring human beings requires guiding them through developmental stages that can be hard to understand. Discipline – how and what to apply - is an area many caregivers struggle with.

Nga Trinh-Halperin, Executive Director of Positive Discipline Community Resources, wants to help parents apply “positive discipline” – a theory pioneered by Alfred Adler that teaches that discipline should not be punitive, rather an opportunity to teach. A \$10,000 grant for parent education will help the organization show parents and caregivers how to apply the technique.

“Positive discipline at the heart is about respect, mutual respect,” said Trinh-Halperin. “What is most important is a clear connection of feeling significant and belonging with the family and community to be able to thrive.”



Playgroup with positive discipline facilitator

Youth Music Monterey County \$20,000 for South County Strings & Youth Orchestras Programs (Arts)

“Few curricula have the ability to integrate important life skills and build communities as music,” says Dorothy Micheletti, Youth Music Monterey County (YMMC) Board President. “We believe in the transformative power of music, its ability to inspire creativity in youth, support higher academic achievement, build bridges between cultures and spark inventiveness,” she said.

A \$20,000 grant will provide operating support for YMMC’s South County Strings, Junior Youth and Honors Orchestras and Chamber ensembles programs. Funding for South County Strings will be used for instruments, instrument rental assistance and weekly string instruction for up to 215 students, who perform in up to three concerts each season. Funding for the Orchestras and Ensembles programs will be used for instructors, concert production, music, tuition and private lesson assistance, and weekly rehearsals for 100 student musicians ages 8-20, who present six public concerts annually.

“YMMC is dedicated to keeping important music opportunities available for South County youth,” Micheletti said.



South County Strings brings music education to the far reaches of Monterey County

STORIES OF IMPACT

Old Monterey Foundation

\$33,585 for Replacement of Perimeter Fence at Lower Presidio Historic Park in Monterey (Historic Preservation)

Perched upon a hill with a sweeping view of the Monterey Bay, the Lower Presidio Historic Park is considered by some to be the most historically significant site on the West Coast. It is from there that the first and only land/sea battle on the West Coast was witnessed when Argentine Privateer Hippolyte Bouchard staged a raid on Monterey in 1818. It's also where Father Junipero Serra and Gaspar de Portola celebrated Mass, marking the founding of Monterey in 1770.



Lower Presidio Gate c1907, courtesy California History Room, Monterey Public Library

A \$33,585 grant to the Old Monterey Foundation will be used to highlight the site's history as it works to transform the area into a park. The grant will be used for a historically accurate white wooden-slat fence that the Old Monterey Foundation hopes will promote the public to bask in Monterey's history.

"Accessibility will be greatly improved by the design and installation of entrance and way-finding signs that will direct the public to the park and inform visitors of its historic features and amenities," said Bill McCrone, board member of the Old Monterey Foundation and chairman of the Lower Presidio Historic Park Sub Committee. "The fence is central to making it feel and look like a park open to the public."

El Pajaro Community Development Corporation

\$20,000 for Microlending & Financial Literacy Services in North Monterey County (Community Development)

El Pajaro Community Development Corporation (El Pajaro CDC) works to improve opportunities for aspiring entrepreneurs.

The Watsonville organization will use a \$20,000 grant for the Empresari (formerly the Business Education and Loan Program) to provide business

education, business development training, technical assistance and access to capital vehicles for disadvantaged entrepreneurs. The program will provide bilingual and culturally appropriate education to support emerging private businesses from communities in northern Monterey County. "The CFMC's support has been instrumental in leveraging El Pajaro CDC's ability to serve more clients," said Carmen Herrera-Mansir, Executive Director.

Along with the development of business planning and operations, participants will learn about budgeting and banking, how to read financial statements and manage credit and debt, the importance of cash flow and how business loans work. An additional focus will be on increasing the understanding of technology.

El Pajaro CDC is the only general business incubator serving Monterey County with expertise and emphasis in targeting underserved, minority and immigrant communities.



El Pajaro CDC empowers North County entrepreneurs

Fund for Homeless Women Grants

2016 marked the third year of grantmaking for the CFMC's Fund for Homeless Women (FHW). This field of interest fund was established in 2012 to address the noticeable increase in homeless women on the Monterey Peninsula. Supporters and volunteers of service providers for the homeless have generously funded a cumulative \$837,220 in grants. Organizers are now building an endowment to support ongoing needs.

The Fund for Homeless Women awarded seven grants totaling \$328,000 in 2016:

Community Homeless Solutions \$40,000 for transitional housing

Community Human Services \$3,000 for emergency assistance for young women

Gathering for Women \$85,000 over two years in support of its new Day Center

Housing Resource Center \$140,000 over two years for permanent housing

Interim, Inc. \$10,000 for emergency motel vouchers for unsheltered women living with a mental illness

Outreach Unlimited \$25,000 for the Interfaith Homeless Emergency Lodging Program (I-HELP) for women

One Starfish Safe Parking \$25,000 for its safe parking program and services

Thanks to FHW donors and support from the County of Monterey's Department of Social Services and Health Department, the CFMC commissioned both an assessment of homeless women on the Monterey Peninsula and Monterey County. The reports are available at www.cfmco.org/FHW.

What We See: Photographs by Women without Shelter

March 15- September 4, 2017

The Monterey Museum of Art has partnered with the CFMC's Fund for Homeless Women to provide cameras to a group of women without shelter to capture the world they see. These 11 women's photographs are images of optimism, faith, and reality. Learn more at: www.montereyart.org.

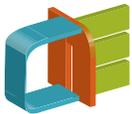


Photo by Jamie A.



CNE Director Kaki Rusmore (left) with past LEAD participants John Bokanovich and Daniela Mejia

2017 Lead Institute Launches



center for nonprofit excellence

COMMUNITY FOUNDATION FOR MONTEREY COUNTY

LEAD Institute kicks off in February with 20 participants from Monterey, Santa Cruz and San Benito County nonprofits. Now in its 8th year, LEAD provides an environment for staff to take the next steps in their leadership journey. Each LEADer attends monthly seminars and develops a challenging project to help their organization thrive.

For some nonprofits, sending a staff member to LEAD each year offers a way to encourage a culture of leadership within the organization. "Our LEAD participants have moved to more responsible positions. It's done wonders for their skill building as well as developing their confidence," said Barbara Mitchell, CEO of Interim, Inc.

The Center for Nonprofit Excellence is proud to support this class of emerging leaders: Ami Villa and Patterson Emesibe, **Door to Hope**; Amy Mascareñas, **El Pajaro Community Development Corp.**; Anna Patterson, **Point Lobos Foundation**; Beth Bowman, **Habitat for Humanity Monterey Bay**; Carolina Cortez and Kevin Gast, **Interim Inc.**; Cindy Storrs, **Gathering for Women – Monterey**; Dail Vannerus, **Salud Para La Gente**; Deborah Pembroke, **Monterey County Rape Crisis Center**; Jenn Rigney, **Monterey Bay Aquarium**; Jonathan Bohorquez, **CHISPA Housing Management Inc.**; Juan Luis Romero, **Community Action Board of Santa Cruz Co.**; Juliet Pool, **MEarth**; Kevin Gast, **Interim Inc.**; Kimberly Willison, **The Carmel Foundation**; Luis Rodriguez, **Urban Arts Collaborative**; Michael Gomez, **YoSal (Youth Orchestra Salinas)**; Priscilla Amao, **Voices for Children CASA of Monterey Co.**; Rene Casas, **MILPA**; and Vanessa Garcia, **Chamberlain's Children Center**.

New Investment Options

The CFMC now offers three investment options for fund holders. Our Investment Committee provides guidance and oversight to ensure that all philanthropic resources are invested and managed according to best practices. With more than \$200 million under management, the portfolios represent the charitable interests of donors and agencies seeking to increase effectiveness and assure future support.



An advantage of pooling funds is greater diversification, which provides for more opportunities while reducing risk and lowering fees. Donors can choose to allocate their gift to one or more of these funds.

- 1 Primary Portfolio**
The primary portfolio has a time frame in perpetuity. Our investment objective is to earn a return that allows a significant distribution of grants while striving to preserve the principal, allowing for inflation and expenses, and fulfill one's philanthropic goals into the future.
- 2 ESG Portfolio (Environmental, Social and Governance)**
The ESG portfolio is designed for those who seek both long-term growth and positive social or environmental impact in a diversified investment portfolio. Composed of funds that meet a variety of social criteria, both positive and exclusionary, this is the best option for those who prefer socially responsible investments.
- 3 Medium Term Fund**
This fund reduces volatility on a year-by-year basis when compared to our long-term primary portfolio. The Medium Term Fund has a greater emphasis on capital preservation while maintaining potential for appreciation. It may be a good choice for those expecting to grant a significant percentage of their funds within 3-7 years. It can be a popular choice for nonprofit agencies for Stewardship Funds (whose assets are not endowed).

For more information, please visit www.cfmco.org/investments.

12th Annual Women's Fund Lunch

SAVE THE DATE!

women's fund
of the community foundation
for monterey county

Tuesday, May 9, 2017
Hyatt Regency Monterey

Keynote Speaker Tracy Gary
Author, *Inspired Philanthropy*

Mistress of Ceremonies Erin Clark
News Anchor, KSBW Action News 8

To purchase tickets:
www.womensfund2017.eventbrite.com



Tracy Gary

WINE COMPLIMENTS OF



www.cfmco.org/WomensFund

To receive an invitation, please contact Jan McAlister at janm@cfmco.org or 831.375.9712 x120.

Southern Monterey County Foundation Tops \$50,000 in Grants

The Southern Monterey County Foundation (SMCF), an affiliate fund of the CFMC, has awarded its third year of grants totaling more than \$50,000. The SMCF raises funds to provide grants to strengthen communities from King City to points south. Grants totaling \$15,000 were made to ten nonprofit organizations serving South County residents:



“ It’s an incredible opportunity to give close to home. It’s truly neighbors helping neighbors. ”
—Paulette Bumbalaugh,
SMCF Advisory Board Chair

- Children's Hospice & Palliative Care Coalition:** to increase access to medical care for children with life-threatening conditions
- City of King:** to support the installation of a citywide security camera system to increase public safety
- Community Food Pantry of King City:** to serve hungry members of the community
- Girls Inc. of the Central Coast:** for Growing Together, a program to increase positive communication between young girls and their parents or guardians at elementary and middle schools in King City
- King City in Bloom:** for city clean-up and beautification projects to promote a healthy quality of life
- Legal Services for Seniors:** for no-cost legal services for Southern Monterey County seniors
- Monterey County Agriculture & Rural Life Museum:** to support the 4th Grade History Jamboree
- Rancho Cielo:** to provide ongoing case management for South County residents in transitional housing
- San Antonio Elementary School:** for the purchase of iPads to implement STEM programs for K-8 students in the San Antonio Valley, Bryson-Hesperia and Fort Hunter Liggett area.
- Sol Treasures:** SOL-O Youth Strings Orchestra & music instruction, a free after-school music program.

For more information or to contribute to the SMCF, visit www.cfmco.org/smcf.

Eikenberry, Mitchell and Pearson Join Board

The CFMC is excited to announce three new members of the CFMC board of directors. These additions to the board bring a wealth of experience, talent, and community passion.



Betsey H. Pearson has worked with nonprofit organizations ranging from social services to education and healthcare. Upon retirement from the United Way in 2010 (where she worked as VP for Operations and Development) Pearson began consulting with local nonprofits providing fund development and strategic planning. She also serves on the board of directors of Carmel Bach Festival and the CSUMB Foundation. She holds a Bachelor of Arts degree from Pomona College and worked in human resources for AT&T, Emporium (Macy's) and Student Placement Services at the university level. She worked for more than 20 years in the nonprofit sector.



Bill Mitchell, a licensed California Real Estate Broker since 1974, is founder of The Mitchell Group Real Estate, Inc. He sold the firm to Sotheby's International Realty in 2005 and joined with his family as broker and Managing Director at Carmel Realty Company. Mitchell holds a Bachelor of Engineering Sciences Degree from the United States Air Force Academy and a Masters of Business Administration from Stanford University Graduate School of Business Administration. He served on active duty for six years in the United States Air Force as an aircraft commander and instructor pilot, including five years of combat duty in the Vietnam conflict, and was honorably discharged as a Captain, USAF in 1969.



Jeff Eikenberry retired in 2012 from Jackson Family Wines as Senior Vice President of Production, where he oversaw all domestic production activities. He has a background in production and marketing and had his own industrial engineering consulting business for seven years. After earning a Masters of Business Administration from San Jose State University, he joined Colgate-Palmolive, progressing through management positions in production and accounting. He joined Heublein Inc., a holding entity for many food and beverage companies. After 14 years, he joined Almaden Vineyards as Vice President of Production. Jeff has served on various nonprofit boards, including Mee Memorial Hospital, Monterey County Vintners and Growers Association, and the Central Coast YMCA.

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College Futures helps students achieve their dreams (p. 1)



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HEALTHY, SAFE, VIBRANT Communities

Giving with Purpose – Ken & Mary Wright

Ken and Mary Wright, CFMC donor advised fund holders, shared in a new video how the CFMC helps facilitate their giving. Ken is a CFMC board member and Soberanes Fire Fund Grant Committee member, and Mary is a former CFMC board chair. Here's what they had to share:

“Recent events have caused us to reflect on the advantages of having a donor advised fund at the Community Foundation. The Soberanes Fire Fund is an example of the leadership the CFMC provides, and the flexibility of a donor advised fund. We were able to make contributions to the Soberanes Fire Fund knowing that the Community Foundation would direct resources to critical needs in a timely manner.

We feel that along with our choices to fund community organizations, the CFMC helps us support nonprofits requiring expedited resources in order to respond to critical community needs.

The Doris Parker Fee Fund has an interest in Big Sur primarily. Doris was a 70-plus year resident of the coast and gave always to the community of Big Sur. Creating the fund in her name was a way for us to honor her.”

Visit www.cfmco.org/donoradvisedfunds to view the video and learn more.

“ Our fund gives us the opportunity to learn from the Community Foundation, who is so rich in their understanding of the needs of Monterey County.

—Mary Wright”



“ It really enriches our philanthropy by making us feel very proactive in our giving. ”
 —Mary Wright

Ken and Mary Wright, CFMC donor advised fund holders

Donor Advised Funds

Donor advised funds help simplify your giving. You receive an immediate tax deduction plus the flexibility of charitable giving over time with the support of the CFMC's Philanthropic Services staff. You can create a donor advised fund quickly and easily with a gift of \$5,000 or more and recommend grants throughout Monterey County and beyond.

For more information call (831) 375-9712 or visit www.cfmco.org/donoradvisedfunds.