

Charitable Instruments

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.

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.

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Healthy, Safe, Vibrant Communities





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.

Join us

Contact us to explore ways to achieve your charitable vision.

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Contact



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



Christine Dawson,
Vice President of
Philanthropic Services
831.375.9712 x126
christine@cfmco.org

Visit

MONTEREY
2354 Garden Road
Monterey, CA 93940

SALINAS
945 S. Main St., Suite 207
Salinas, CA 93901

To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County