

A Personal Approach to Giving Philanthropic Services



Christine Dawson (l) and Dan Baldwin (r) assist Lupe Gomez (center) in creating the Trinidad Gomez Family fund to honor her late husband.

The Community Foundation for Monterey County is Your Partner in Philanthropy

From assisting you or your family with a donor advised fund, leaving a legacy through a planned gift, supporting a private foundation with grantmaking or administrative services, or helping your business with a corporate giving plan, the Community Foundation for Monterey County (CFMC) is here to facilitate your philanthropy and help you achieve your charitable goals.

Philanthropic Services

The CFMC's philanthropic services offer expertise and local insight with customized solutions to reflect your charitable vision. Lawyers, estate planners, CPAs and wealth managers trust the CFMC to take the time to understand their clients' specific needs and deliver services that support thoughtful and impactful giving.

Donor Advised Funds

Donor advised funds at the CFMC help maximize the impact of your giving. You make a tax deductible gift to the CFMC and recommend grants over time. You benefit from the convenience and community knowledge of our professional staff.

Charitable Giving Options

The CFMC can assist you with lifetime or estate giving including creating a fund, charitable lead or remainder gifts, charitable gift annuities (CGAs), gifts of real estate or complex assets and more. We are happy to meet with you or your professional advisor to maximize the impact of your philanthropy.

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

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Healthy, Safe, Vibrant Communities

“My mother likes the idea that the Trinidad Gomez Family Fund will always be there honoring him, and will give back to the community in perpetuity.”

—Patricia Gomez (Trini & Lupe's daughter)

Trinidad “Trini” Gomez was a fifty year veteran of the agriculture industry in the Salinas Valley. To honor his love of agriculture, second only to his deep love of family, Lupe (Trini's wife of 67 years) and their children established the Trinidad Gomez Family Fund. The four children will assist their mother in recommending grants in agricultural education and other areas that were important to their father. In the future, they will succeed their mother as the fund's advisors.





Fund holders Lary Lynn and Tony Muller

“Working with the CFMC opened doors to find the right local people and agencies for the programs that are important to us. The CFMC’s efforts and community knowledge added considerably to their effectiveness.”

—Tony Muller

Join us

Achieve your charitable goals with customized Philanthropic Services.

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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

Opening a Donor Advised Fund

You make a gift to the CFMC, then remain actively involved in giving to the causes you care about most. Your fund can be endowed (a percentage of the fund is available to grant) or non-endowed (any part of the fund can be granted at any time.)

Benefits—from Gift to Grant

Donor advised funds are convenient, flexible tools for individuals, families, businesses, or groups, making it an ideal vehicle for fulfilling your charitable wishes.

- Establish a fund today and make grant recommendations now or in the future.
- Receive an immediate tax deduction at the time of your donation.
- Receive grantmaking assistance from staff.
- One tax deductible gift can support multiple organizations.
- Your grants can be combined with others to increase impact.
- Simplify your record-keeping and administration.
- Donor advised funds are less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).
- You can add to the fund at any time, receiving tax benefits with each new gift.

How it Works—it’s Simple

- You make a gift to the CFMC—you can use cash, appreciated stocks, real estate, or other assets.
 - A fund is established in your name, in the name of your family or business, or in honor of any person or organization you choose.
 - You receive tax benefits in the year your gift is made.
 - You recommend grants from your fund—working with our professional program staff to support the causes and organizations you care about most.
 - Your grants are presented to the CFMC board for approval.
 - We handle all administrative details and issue grants to nonprofits in the name of your fund. (If you prefer, grants can be made anonymously).
 - Fund options
 - Non-endowed – You can recommend grants up to the full amount of the fund.
 - Endowed – A percentage of the fund is made available for grantmaking each year.
- In both cases you can add to your fund at anytime, or include the fund in a legacy gift through your estate.

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