



PASSING YOUR VALUES TO THE NEXT GENERATION

The Benjamin Family Foundation



Community Foundation for Monterey County (CFMC) staff recently spoke with David Benjamin about his family's philanthropy and their choice to include their grown children in the process. David and Laurie Benjamin have been donor advised fund holders since 1999. They recently converted their endowed fund to the Benjamin Family Foundation, a non-endowed donor advised fund at the CFMC.

How did you get involved with the CFMC?

"We've been involved in the foundation for many years. I was asked to serve on the board by (then board chair) Sherri McCullough in 1993. I've been on the investment committee ever since. That's an extremely important committee because the performance of investments dictates how much we're able to give back to the community."

If young people start giving early, it's habit forming. — DAVID AND LAURIE BENJAMIN

What are the benefits of being a fund holder? "With a donor advised fund, there's a lot of flexibility. You can give in state or out of state. The staff is extremely helpful from an administrative standpoint. Converting from an endowed to non-endowed fund provides even more flexibility." (With a non-endowed fund donor advisors can recommend grants up to the full value of the fund.)

Why did you create the Benjamin Family Foundation at the CFMC rather than a private foundation?

"The laws favor the donor advised fund model. We especially appreciate the administrative part. A private foundation must be quite large to be efficient. The CFMC acts as our (virtual) staff. It's a lot more convenient to have the community foundation as a philanthropic partner."

What values did you want to pass down to your children? "We've gotten a great deal of joy and satisfaction from our giving. We believe it's important to demonstrate to your children what you believe in. Most kids in their 20s don't spend a lot of time thinking about philanthropy. We felt one of the things we could do for them was to introduce them to the process."

The Benjamins' children, Elizabeth, 27 and David, 25 both reside in New York City, and are involved in supporting nonprofits. Their parents invited them to meet with CFMC staff Dan Baldwin and Christine Dawson on a recent visit to talk about the fund.

"They thought it was pretty cool. They're looking forward to getting involved. If young people start giving early, it's habit forming. We think they'll enjoy it. Now's the time – we're delighted."

Editor's Note: David is a former CFMC board member (1993-1998), served as Board Chair (1997-1998) and serves on the Investment Committee. Laurie is active in the Women's Fund. The Benjamins received the CFMC Distinguished Trustee Award in 2012 for their support of local nonprofit organizations in the areas of health, education, environment and animal welfare.

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Philanthropy Celebrated

F. Robert Nunes Honored



Distinguished Trustee Award recipient Bob Nunes presents a grant check to SPCA board chair (and past Distinguished Trustee Award recipient) Sherrie McCullough

More than 250 supporters came together for the annual Celebration of Philanthropy held October 22 at Corral de Tierra Country Club. A highlight of the evening was the presentation to F. Robert (Bob) Nunes of the 2014 Distinguished Trustee Award. The CFMC established the award in 1989 to honor those who have demonstrated philanthropic leadership in supporting nonprofits in Monterey County.

Bob's giving philosophy is simple, "It just seems like the right thing to do." Bob has been a fund holder at the CFMC since 1996. Though

donor advisors at the CFMC can grant to any nonprofit organization worldwide, Bob prefers to keep his giving local. He wants to help "the vulnerable, the very old, the very young, the very poor, the very sick, and animals."



Outgoing board members Ann Brown (past chair) and Kelly McMillin were honored by CFMC chair Gail Delorey for their service

"(Giving) just seems like the right thing to do." —BOB NUNES

As the award recipient, Nunes was able to designate \$10,000 from the CFMC to the nonprofit organizations of his choice. He chose to present grants of \$5,000 each to Meals on Wheels of the Monterey Peninsula and the SPCA of Monterey County.

PRESIDENT'S MESSAGE

Inside the Numbers

Community foundations can't seem to avoid numbers. Total assets. Grants. Gifts. We especially focus on them as we finish one year and start another. I'm happy to report that the CFMC's 2014 numbers are good. Nearly \$180 million in total assets. A record \$11.3 million in grants. \$13.1 million in gifts. All signs of a healthy community foundation.

But, sometimes, if you look inside the numbers a more compelling story emerges. I recently re-read our strategic plan, passed in December 2010. Many of the goals we set for ourselves are in full operation. One, in particular, stuck out: **The Foundation also seeks more proactive engagement with its fund holders, to support their philanthropic goals, and to involve them more fully in the Foundation's work.** We've

worked on this in many ways: electronic access to fund statements and grant making through DonorCentral; one-on-one visits; and, opportunities for "co-investment" in our Community Impact grant programs. All of these have strengthened our relationships with donor advisors, and increased their giving and grantmaking.

In 2014 we more-or-less stumbled on an epiphany (I guess that's akin to tripping on a lightning bolt...): what if endowed donor advised funds were converted to non-endowed? What if the entire fund would be available for grantmaking? This idea was broached by a few of our fund holders so we began to share it more broadly. (Note: this conversion is only possible if requested by the donor, and it requires board approval.) This year alone, nine donor advised funds were converted from endowed to non-endowed. Over \$1.6 million was added to those funds, and \$697,000 granted.

Also inside our year-end numbers has been a whopping \$1.33 million generated by Monterey County Gives!, the year-end initiative in which donors can support up to 100 nonprofit organizations. Gives! is a partnership between the Monterey County Weekly and the CFMC, utilizing the Weekly's corporate donor advised fund. By making yearly improvements, Gives! has almost tripled since 2010. Much credit goes to Monterey County Weekly CEO Bradley Zeve and his staff, and much credit also goes to the hard-working philanthropic services department of the CFMC. The benefit Gives! creates for our nonprofits and our county is reaching new heights.

The numbers are important benchmarks. And we're proud of them. But there is always a story that drives those numbers. We're proud of those, too.

Looking forward to even greater things in 2015.



Dan Baldwin shares CFMC's accomplishments at 2014 Celebration of Philanthropy

There is always a story that drives those numbers.

—DAN BALDWIN, PRESIDENT/CEO

MONTEREY COUNTY GIVES!

A record \$1.33 million was raised to benefit more than 100 local nonprofits through the Monterey County Gives! campaign. It was the most successful year ever thanks to a matching fund pool of \$175,000 and challenge grants from donors adding \$187,866 to the total.



The CFMC provided additional grants of \$1,000 each to Peace of Mind Dog Rescue for having the most donors, the Monterey Charter School for the most donors under 35 and Friends of the Salinas Public Library for the Ingenuity Award for their "Big Idea."

The Monterey County Weekly Community Fund is a donor advised fund of the CFMC. Thanks to Neumeier Pomo Investment Counsel, the David and Lucile Packard Foundation, Cannery Row Company, Whole Foods Monterey and the Ona and Robert Murphy Charitable Trust managed by Kilzer Wealth Management for their generous support of the match. Additional support provided by the Doolittle and Jose F. Fernandez Funds of the CFMC.

Jean and Jim Duff Fund

— A GIFT FROM THE HEART

Jean Duff was introduced to philanthropy by her late husband, Jim Duff. Jean, a native of England, met and married Jim in Los Angeles, where Jim had a successful business and they developed a habit of regular giving to local nonprofits. They came to Pebble Beach to retire over 25 years ago. Once they arrived on the Monterey Peninsula, they changed their allegiance to organizations here, such as Hospice of the Central Coast, the Monterey Bay Aquarium and Meals on Wheels.



Jean Duff and her late husband Jim Duff

Jim died in 2010, and through his estate, a trust was established for his son, James Jr., with the provision that upon his son's death, any remaining funds should go to benefit local charities. James Jr. died in 2014. To honor Jim's legacy, Jean used part of the funds to establish a golf scholarship with the Southern California Golf Foundation, as Jim was an avid golfer. The remainder of the trust went to Hospice Giving Foundation, where she is a board member emeritus, and to the CFMC to establish the Jean and Jim Duff Fund, an endowed donor advised fund.

Her plans are to make contributions to local needs over time. As a fund holder at the

“ I think it's very important to support local nonprofits, which support our local community. — JEAN DUFF

CFMC, she will receive information on worthwhile grant requests in her areas of interest. Jean also gives generously of her time to the Community Hospital of the Monterey Peninsula and the Alliance on Aging.

Through the Jean and Jim Duff Fund, a gift originally established for a loved one will now benefit the community forever.

Lee-Alexander Named VP Grants and Programs

The CFMC welcomed Laurel Lee-Alexander as its new Vice President of Grants and Programs. She succeeds Julie Drezner, who retired in December.

Lee-Alexander was Director of Philanthropy for the Monterey Peninsula Foundation (MPF), host of the AT&T Pebble Beach National Pro-Am golf tournament, for the past twelve years where she led grant programs and advised nonprofits on organizational capacity.

Before joining MPF, Lee-Alexander was Senior Program Officer at the CFMC, and was also responsible for fund development at the Middlebury Institute of International Studies at Monterey and the United Way. She also held corporate marketing positions with Dole Fresh Vegetables Co., The Walt Disney Company, and Colgate-Palmolive Company.

You can contact Laurel at laurel@cfmco.org or 831.375.9712 x112.



“ I was drawn back because of the CFMC's history of grantmaking, donor services and community leadership.

— LAUREL LEE-ALEXANDER

New Funds Established*

Agency/Stewardship

Voices for Children Stewardship Fund
Church in the Forest Stewardship Fund

Corporate Fund

The Carmel Realty Foundation

Donor Advised

The Fred Terman and Nan Borreson Fund
Gloria Fund
Hodges Family Fund
Howard and Anne Morgens Fund
Reese Family Fund



Jim Morgens and his brother Ned closed their family foundation and created a donor advised fund named for their parents, Howard and Anne Morgens

Field of Interest Fund

The MPUSD Fund for the Arts

Scholarship

Joseph and Betty Spradling
Scholarship Fund

Private Foundation Fund

Alexander F. Victor Foundation

The CFMC manages more than 350 funds established by individuals, families and businesses. To learn more, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

Legacy Society

New Legacy Society Members*

David and Maryanne Spradling
Reid-Robnett Family Trust

The Legacy Society was created to recognize and honor those who thoughtfully plan gifts through bequests, trusts, life insurance, charitable gift annuities, and other estate gifts. Members are recognized in our annual report and invited to an appreciation luncheon each year to hear first-hand from President/CEO, Dan Baldwin about the impact that Legacy Society members have created. If you are interested in joining the Legacy Society, have already included the CFMC in your estate plans, or would like more information about planned giving, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

*Since October 2014



Randy Tunnell

(l to r) Dan Baldwin, Tonya Antle, Stephanie Harkness, Christine Dawson, Judy Profeta

Bubbles & Bags Supports GHGH

The first annual Bubbles & Bags Silent Auction in support of the Girls' Health in Girls' Hands (GHGH) initiative was a big success. Bubbles & Bags, hosted by the Pebble Beach Company at the Beach Club, raised an impressive \$38,606 to support this girl-led health empowerment program of the Women's Fund. More than 300 came to purchase bags generously donated by community members to help sustain the success of the GHGH program and reach even more girls. Thank you to co-chairs Stephanie Harkness and Judie Profeta and all of our sponsors for making this event possible.

Bubbles & Bags was hosted by the Pebble Beach Company, and sponsored by Augustina's, Illusions of Grandeur, Natalie Baroni Jewelry Designs and the Schaeffer, Present & Stoffers Investment Group of RBC Wealth Management. Additional support was provided by 65° Magazine, Comerica Bank, GBG, Jane Emison, Mann's, and Monterey Aesthetics Center.

SAVE THE DATE!
Women's Fund Luncheon
April 30, 2015

Join more than 400 supporters at this inspiring event celebrating the 10th anniversary of the Women's Fund. To receive an invitation or become an event sponsor, please contact Christine Dawson at 831.375.9712 x126.

women's fund

of the community foundation
for monterey county

www.cfmco.org/womensfund

Women's Economic Security Initiative Launched

Nearly two-thirds of working women in Monterey County are "economically insecure" – living on the edge of poverty, under constant financial stress. Research shows that economic prosperity for women is essential to the health and vitality of an entire community. To increase the number of women that are economically self-sufficient, the Women's Fund will launch a three-year Women's Economic Security (WES) Initiative in 2015.

The goal is to help low-income women, especially those caring for children, gain access to the education, training, and support services they need to secure increased wages and jobs with advancement potential. The ACTION Council of Monterey County has been selected to lead the pilot project, entitled Women's Circles/Circuitos de Mujeres. They will receive a grant of \$225,000 over three years from the Women's Fund to implement the program. Trained peer facilitators will organize neighborhood-based weekly group meetings in East Salinas, Greenfield and Castroville to help low-income women support themselves and each other in identifying and pursuing their educational/career goals, overcoming roadblocks, and developing life and self-advocacy skills.

A grant of \$90,000 from The Claire Giannini Fund will subsidize on-site and school childcare costs. Additionally, The Peggy and Jack Baskin Foundation has granted a total of \$75,000 over three years to support the initiative, and an anonymous donor has given \$10,000 to support the emergency assistance fund.

The Women's Fund was created to improve the lives and increase opportunities for women and girls in our community. Our vision is that every woman and girl in Monterey County has what she needs to be healthy, confident and able to fulfill her dreams.



This initiative is a way to help mothers break the cycle of poverty for their children. It's another way the Women's Fund invests in women and girls to support themselves and one another.

—CHRISTINE DAWSON,
CFMC DIRECTOR OF
PHILANTHROPIC SERVICES

GHGH Summit Empowers

On November 22, Girls' Health in Girls' Hands (GHGH) hosted more than 100 participants at the annual health summit. Attendees from throughout Monterey County participated in activities organized by girls, for girls, geared toward youth and health empowerment.

Offerings included workshops on stress, healthy eating, body image and self-esteem, reproductive health and healthy relationships. Physical activities included yoga, U-jam, Zumba and self-defense.

The Girls Leadership Network shared research on the importance of different health issues to local girls.

The participants voted on emotional and social health as the top issue to take action on for 2015.

GHGH is an initiative of the Women's Fund and our funding partners: The Peggy and Jack Baskin Foundation, The Claire Giannini Fund, Monterey Peninsula Foundation, The David and Lucile Packard Foundation, Nancy Buck Ransom Foundation and Women's Fund donors.

For more information, visit www.cfmco.org/ghgh.



Kristen Fletcher

GHGH participants chose social and emotional health as their priority issues

I learned how to make healthier choices and that my voice matters.

— GHGH SUMMIT PARTICIPANT

GHGH 
Girls' Health in Girls' Hands



Richard Green

Packard scholar in residence
Lucy Bernholz addresses local
nonprofits

Capacity Builders Network Members Collaborate to Benefit Local Nonprofits

The Center for Nonprofit Excellence and other members of the Capacity Builders Network have been meeting quarterly for the past two years to coordinate efforts to boost the effectiveness of local nonprofits.

Thanks to the generous support of The David and Lucile Packard Foundation, the group hosted a talk by Lucy

Bernholz on December 2 about Future Nonprofit Trends, especially as they relate to technology, data and ethics. 75 people attended the program held at the National Steinbeck Center. Bernholz is a visiting scholar at Stanford University's Center for Philanthropy and Civil Society and author of the award-winning blog, *Philanthropy2173.com*. Visit www.grantcraft.org to download "Philanthropy and the Social Economy: Blueprint2015."



organizations for 2015. The hope is that by offering complementary trainings, nonprofit organizations will gain a deeper understanding of ways to improve their programming and community support.

The first CNE event in the evaluation series is a two-part workshop, **Developing Vision Statements**, presented by the Franklin Fund.

It will be held March 2 and 10 from 4:30 to 7:30 PM and includes dinner. It combines personal and organizational visions for a stronger result. The cost is \$40 per person. Advance registration is required at www.cfmco.eventbrite.com.

Capacity Builder Network Members: Action Council, Association of Fundraising Professionals (AFP), Community Foundation Santa Cruz County, CSUMB, Development Executives Network (DEN), First 5 Monterey County, Hayashi Wayland, Leadership Monterey Peninsula, Nonprofit Alliance for Monterey County (NAMC), Salinas Public Library, Seaside Public Library, TPO Human Resources, and the United Way's Volunteer Center, Foundation for Monterey County Free Libraries

CNE activities are supported in part by a grant from the David and Lucile Packard Foundation

“Connections have been growing between our various efforts and organizations...”

— KAKI RUSMORE, DIRECTOR, CENTER FOR NONPROFIT EXCELLENCE

For the first time, the Capacity Builders Network chose a shared learning theme. Evaluation will be an area of concentration across the

LEAD Graduates 5th Class

The fifth class of the LEAD (Leadership Education and Development) Institute graduated December 12 at a ceremony held at the Pacific Grove Museum of Natural History. The program prepared 14 emerging nonprofit managers from Monterey, Santa Cruz and San Benito Counties for greater leadership responsibilities. Keynote speaker Willow Array, ED of the Alisal Center for Fine Arts, said the program helped participants express their “authentic selves” to better serve their organizations and communities.

LEAD Institute 2014 graduates:

Monterey County

Willow Array, *Alisal Center for the Fine Arts*

Christina Barnes, *Interim, Inc.*

Jennie Burciaga, *Restorative Justice Partners, Inc.*

Denise Felix, *Door to Hope*

Emily Howard, *Return of the Natives Restoration Education Project*

Marciano Huerta, *Sun Street Centers*

Nathan Jones, *Peacock Acres*

Elizabeth Panetta, *Loaves, Fishes & Computers, Inc.*

Rob Rapp, *Community Human Services*

Pearl Sanchez, *Turning Point of Central California*

Ann Wasser, *Pacific Grove Museum of Natural History*

Santa Cruz County

Maria Sanchez, *Encompass Community Services*

Megan Searcy, *Arts Council Santa Cruz County*

San Benito County

Krystal Jones, *Chamberlain's Children Center Inc.*



LEAD Institute Class of 2014 graduation ceremony

“LEAD is a life-changing professional development program.”

—ELIZABETH PANETTA, LOAVES, FISHES & COMPUTERS

Including this group, more than 80 local leaders from 70 organizations have completed the LEAD program since 2009. This in-depth professional development program is a part of the CFMC's Center for Nonprofit Excellence.

For more information, visit www.cfmco.org/lead.

New Board Members Join CFMC

James Panetta

serves as a Monterey County prosecutor. Previously he worked in Oakland for the Alameda County District



Attorney's Office as well as at the California Attorney General's Office. He received his law degree from Santa Clara University and his undergraduate degree from U.C. Davis. Jimmy is the co-chair for the Capital Campaign for the Central Coast Veterans Cemetery and serves on the Board of Directors for Central Coast Veterans Cemetery Foundation, the Monterey County Veterans Transition Center, the Rancho Cielo Youth Campus, the National Steinbeck Center, and on the Advisory Council for the Monterey Bay National Marine Sanctuary. He is a member of the American Legion, Veterans of Foreign Wars, and Iraq and Afghanistan Veterans of America. Lieutenant Panetta was awarded the Bronze Star Medal for meritorious service.

Erica Padilla-Chavez

was born in Watsonville, CA. Her career has embodied a commitment to the improvement of health and wellness for all individuals.



With over 17 years of experience in the health and human services field, Erica has a history of facilitating collaborations among partners that can impact positive changes in our communities. Formerly she served as the Health Equity and Policy Manager for the Monterey County Health Department and more recently was appointed as the CEO of Pajaro Valley Prevention & Student Assistance, Inc. Erica is a Member of the Hartnell College Board of Trustees representing the communities of Salinas, Chualar, Gonzalez and Soledad. Erica attended UC, Berkeley where she received her BA in Sociology and holds a Masters in Public Administration from Golden Gate University.

GRANTMAKING

Big Sur Fire Brigade

\$27,500 Healthy Places & Spaces grant

The Big Sur Volunteer Fire Brigade was recently awarded a grant for the purchase of 10 new Kenwood Model TK 5210 radios in order to improve their communication response and coordination with other emergency service providers. After conducting a multi-agency regional study, they concluded that there was a dire need to provide for a standard portable, digital radio that meets federal Program 25 standards and interoperability across all local, regional and federal agencies. Two donor advisors co-invested \$10,000 in this grant.



Live fire training 2014

The new equipment made possible by the grant will enable us to better respond to all types of emergencies.

— MARTHA KARSTENS, FIRE CHIEF

University Corporation at Monterey Bay

\$20,150 Healthy Places & Spaces grant

The University Corporation at Monterey Bay was recently awarded \$20,150 to support their community garden in Salinas' Chinatown in an effort to increase participation in gardening activities and improve cleanliness and access to produce. The garden provides a safe haven for the homeless community, providing them access to 3' X 6' garden beds to grow their own food. A large kiosk sits in the middle creating a space for homeless residents to meet and discuss issues such as safety, sanitation and homeless services. The City of Salinas and a number of homeless service providers, including CSUMB, are working together on a long term plan to support the nonprofit community in providing much needed services and programs in this blighted neighborhood.



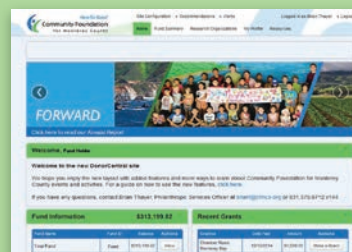
Community garden provides safe haven

Donor Central Updated

The online portal, DonorCentral, was recently upgraded, giving CFMC fund holders a more user friendly experience while keeping them up to date on the CFMC's initiatives, events, and funding opportunities. DonorCentral is the fastest, most convenient way to make grant recommendations, edit information, research funding opportunities, and check current fund balances. The upgrade incorporates an improved look and feel including a graph of

each donor's giving history. Enhanced features such as the ability to create recurring grants and export grant and gift history have also been added. Funding opportunities will be populated based on the interest areas selected in each donor's

profile making for a more personalized experience. Please contact Philanthropic Services Officer, Brian Thayer, at 831.375.9712 x144 or email briant@cfmco.org for details.



IMPACT

Carmel River Watershed Conservancy

\$16,500 Environmental Engagement grant

In 1999 American Rivers named the Carmel River one of the ten most endangered rivers in the US. In response, the Carmel River Watershed Conservancy was established to protect the watershed and its natural resources. Recent activities include conducting an assessment of the health of the watershed's creeks, streams and habitat; producing an action plan for restoring watershed resources; watershed tours; and supporting the rerouting and removal of San Clemente Dam, which is expected to make miles of habitat available to threatened species. This grant will support public education, signage and training to help the public better understand how they can protect and restore the Carmel River Watershed.



Schulte Restoration Project sign courtesy of MPWMD and artists Jessica Neafsey and Emily Underwood

Alisal Center for the Fine Arts

\$20,000 Celebrating Our Cultures grant

Alisal Center for the Fine Arts (ACFA) was established in 1986 to provide art instruction and highlight contemporary and cultural heritage to foster creativity and facilitate empowerment for the Alisal community. ACFA offers free weekly arts classes and directly serves around 200 youth per week. These classes organize community exhibitions, festivals and performances. ACFA promotes cultural expression and community pride in East Salinas, understanding that the arts can play an important role in community development. CFMC funding has been used to support a full time Executive Director and strengthen the internal capacity of the organization as it grows and evolves to better serve its community.



Rondalla Alisal performing for East Salinas Community

“More than a guitar lesson, or a painting class, ACFA gives us the opportunity to visualize our lives in a different place, if only for a moment.” — RAMONA PALACIO

Grant Applications Now Online

As part of the CFMC's efforts to provide an easier application process, we are moving grant applications online. This decision was made after researching different options to find a system that had both enough flexibility for the CFMC and was simple to use for applicants. Research included testing alternatives and meeting with other foundations using different online grant systems.

This new process will allow organizations to keep all of their CFMC applications in one place, including an easier way to submit final reports.

This system also allows the grant committees to review applications online to streamline the process. The goal is to spend less time processing applications and have more time for substantial review. Preliminary feedback from our nonprofit partners has been extremely positive and we welcome your comments.

Visit www.cfmco.org/apply for more information.



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 *Here for Good*
Community Foundation
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Richard Green

Girls find their voices at GHGH Summit



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INSIDE

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Everyone Needs a Plan for the Future

As you make charitable giving decisions for the new year, we look forward to helping you create a plan that addresses your unique needs and goals at every stage of life.

The Community Foundation for Monterey County has partnered with hundreds of individuals, families and their advisors in their philanthropic planning.

If you would like to learn more about the tax savings and benefits of charitable giving options now, or leaving a legacy through your estate, please call 831.375.9712.

Charitable Gift Annuity – A win-win

Giving through a Charitable Gift Annuity (CGA) allows you to make a generous gift to your community and benefit the nonprofit of your choice, while providing yourself with a new fixed income source you can count on for the rest of your life.

“The CGA is a win-win situation where both the income beneficiary and the charity benefit.”

—MARIAN BUCCAFURNI AND PAUL LAWRENCE

How it works

- You establish a CGA with the CFMC either naming a beneficiary agency, a field of interest or unrestricted fund by donating cash, appreciated stocks, real estate, or other assets.
- You receive a stream of income that is fixed for life, regardless of market conditions.
- A portion of the income may be tax-free.
- You receive an immediate tax deduction for the charitable portion of your gift. The CFMC handles all the administrative details, issuing annuity payments to you during your lifetime and, afterward, issuing annual grants to the nonprofit of your choice in the name of your fund.



To learn more, please call President/CEO, Dan Baldwin or Director of Philanthropic Services, Christine Dawson at 831.375.9712 or visit www.cfmco.org.