

# Giving Options

Fulfill your Philanthropic Vision

THE COMMUNITY FOUNDATION IS "TRUST"



Bertie Elliott, The Buffett Fund of the Community Foundation for Monterey County, Legacy Society member

## Types of Charitable Funds

The Community Foundation for Monterey County (CFMC) manages more than 500 charitable funds for individuals, nonprofits and businesses, and is a trusted steward of philanthropic assets and donor intent. In addition to donor advised funds, funds can be established to benefit individual nonprofits, a field of interest (such as arts, youth or the environment) or unrestricted, to address critical grantmaking needs. A fund you create in your lifetime makes an excellent vehicle for a planned gift as you consider your philanthropic legacy.

- **Donor Advised Funds** You create a fund now and recommend grants to your favorite nonprofits at your convenience. Our experienced staff works with you to support the causes you care about most. You'll enjoy being actively involved in charitable giving without the administrative hassle. Grants can be made in Monterey County and beyond.
- **Field of Interest Funds** Identify the interest area of most importance to you. The CFMC awards grants to nonprofit organizations making a difference in your area of interest.
- **Designated Funds** Direct your gift to specific nonprofit organization or organizations. Nonprofits can also use a designated fund to build their endowment and enhance their ability to accept large and complex gifts.
- **Scholarships** Invest in our community's future. You establish the criteria students must meet to receive the scholarship. Students achieve their academic goals and are on their way to a brighter future thanks to your generosity.
- **Unrestricted Funds** Your fund can address future needs that often cannot be anticipated at the time your gift is made. The flexibility of this type of fund enables the CFMC to evaluate all aspects of community well-being and respond to the community's most pressing needs, today and tomorrow.



"We like the motto, 'Here for Good.' Community foundations are strong and long-lived. The CFMC has an intimate knowledge of the effectiveness of local nonprofits that is really valuable."

– Jackie and Peter Henning, The Peter and Jackie Henning Fund of the CFMC

## Create a Fund

Funds can be established in your name, the name of your family or loved one, your organization, or anyone you wish to honor. All grants distributed—today and in the future—are awarded to nonprofits in the name of your fund. It's a great way to leave a lasting legacy.



With the CFMC's charitable giving options you receive customized solutions that best meet your needs.

## Partner with us

Contact us to fulfill your philanthropic vision.

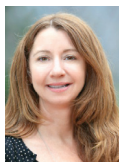
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## Contact



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## Ways to Give

Whether you establish a new fund or wish to support an existing fund, there are a variety of giving options to achieve your goals.

With the CFMC you receive personalized service. Each individual, family or organization we work with has unique charitable interests—and unique financial circumstances. We help you create a customized giving plan, so you receive the greatest return on your community investment. There are many options for giving now or giving later.

- **Outright Gift** You make a gift of cash, stocks, bonds, real estate, or other complex assets to the CFMC. We help you evaluate charitable giving vehicles to receive maximum tax advantages for your gift.
- **Gift by Will** Designate a gift or portion of your estate to the CFMC and, in some cases, receive a substantial reduction in federal gift and estate taxes. Or, you can name the CFMC as a beneficiary of your life insurance policy or retirement account.
- **Charitable Gift Annuity (CGA)** You make a gift of cash or property to the CFMC now, get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life. Upon your death, the remainder creates a fund to benefit the nonprofit of your choice.
- **Charitable Remainder Trust (CRT)** You place cash or property into 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 CFMC 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 place cash or property into a trust that pays a fixed amount to the CFMC 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.

## How It Works



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