Strategic Plan Goal: Educate the Public about Philanthropy
How? Sharing Stories through

- Advertising
- Print Materials
- Electronic News
- Website
- Blogs/Social Media
- Public Relations
CREATE YOUR LEGACY
GUIDE TO PLANNED GIVING

Here for Good
Community Foundation
for Monterey County

Graphics: Putting a Face on Philanthropy
Faces of Philanthropy - Join Us!

Design Your Philanthropic Vision. We can help.
Siembra Latinos Fund
Cultivating Healthy, Safe, Engaged Latino Communities in Monterey County

About the Siembra Latinos Fund
Join us in creating change and investing in our future for the well-being of Latino families, children and seniors in Monterey County. The Siembra Latinos Fund (SLF) was created by a group of Latino leaders to empower our community to come together and make a difference. Siembra means “to sow,” and the fund aims to grow opportunity and strength through collaboration and meaningful investments.

Donor Advised Funds
A Personal Approach to Giving

Donor advised funds at the Community Foundation for Monterey County (CFMC) help simplify and maximize the impact of your giving. You make a tax-deductible gift to establish your fund and recommend grants over time to the causes you support today. You benefit from the convenience and summary knowledge of our professional staff.

Donor advised funds at the CFMC are convenient, flexible tools for individuals, families, businesses, or groups—making it an easier vehicle for fulfilling your charitable wishes.

Donor advised funds are:
- Easy to establish and manage
- Can utilize a wide variety of assets (cash, appreciated stock or real estate)
- Receive immediate tax benefits in the year the gift is made
- Build a legacy for future generations
- A place to pass along your purpose and philanthropic values

Benefits
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Design Your Philanthropic Vision. We Can Help.
From advising your own family with a donor advised fund to leaving a legacy through a planned gift, supporting a specific non-profit with a matching gift, or administrative services, or helping your business with a corporate giving plan, the CFMC is here to facilitate your philanthropy and help you achieve your charitable goals.

Leaving a Legacy
The Gift of a Lifetime

Bill and Nancy Dowdle
“We feel very comfortably making legacy gifts to the Foundation knowing that it will be a good steward of our donations and will make grants that are relevant to the most pressing local needs today.”

“Hiring with the Community Foundation for Monterey County means that instead of having to organize and work with several different nonprofits, we can just make requests for what we need and CFMC will take care of it.”

You can establish a fund that supports one or more specific non-profits, a local element or an endowed fund, allowing the CFMC to adapt your fund; granting to community needs over time when you make a gift through the Community Foundation for Monterey County (CFMC), we establish a fund that becomes your personal legacy of giving.

It works:
- You make the Community Foundation for Monterey County a beneficiar of your estate plan
- Your estate is organized and managed by the CFMC
- Your fund grows at a market rate of return
- Your fund provides tax benefits for you or your estate

Charitable Remainder Trust
Make Your Gift Work for You

Charitable Remainder Trust (CRT)
A charitable remainder trust is a vehicle into which you can place assets and, at some future time, benefit from the income the investments generate.

How it works:
- You create a trust with the assistance of your professional advisor.
- You donate appreciated stock, closely held stock, real estate or other assets into the trust.
- You select children, family, or friends as beneficiaries of the trust.
- You receive a charitable income tax deduction.
- You receive lifetime income for you or your named beneficiaries, a portion of which may be tax-free.
- Payments may be fixed or variable.
- The minimum annual percentage carried is 5%, 7% or more.

The CRT is “gifted to the remainder” upon your death. The remainder creates a fund at the CFMC that benefits the causes or programs of your choosing. The fund can also support general endowment campaigns or create a donor advised fund that your children or another designated charity can use. The fund will be in your name or in honor of any person you choose.

The fund becomes a permanent philanthropic endeavor helping to do good work for others. As an endowed fund, the principal is invested and a percentage of the balance is available for granting each year.

From Real Estate to Life Income
“Working with the CFMC to plan a legacy of giving has given me great satisfaction and peace of mind.”

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“Working with the CFMC to plan a legacy of giving has given me great satisfaction and peace of mind.”

-Nancy Dowdle

For more information about donor advised funds, trust and other charitable giving options, please contact the CFMC at 831-373-3294 or email us at info@cfmon.org

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Healthy, Safe, Vibrant Communities
Advertising

- Carmel Magazine
- Carmel Pine Cone
- Monterey County Weekly
- Cultural: (i.e. Symphony, Carmel Music Society)
- Targeted (King City Rustler - (SMCF)
- Coastal Grower Magazine
- Radio (KAZU)
GROWING GIVING

“I enjoy learning about different giving options. My giving has grown to new areas of interest and it’s wonderful to see the impact.”

— Jean Duff
Jean and Jim Duff Fund of the Community Foundation for Monterey County

Read Jean’s story: www.cfmco.org/Duff

GIVING by Design

“The Community Foundation is a design studio for philanthropy that invites you to pull up a chair at the table. You would be simply amazed at the possibilities.”

— Bill Tyler, The William H. and Susanne Tyler Pathway Fund of the CFMC

Design your philanthropic vision. We can help.

Donor Advised Funds • Charitable Estate Planning (CGAs, CRTs) • IRA Qualified Charitable Distributions • Scholarships & More

831.375.9712 | www.cfmco.org | f | t | i | n | o
TRUST

“We hope to make a difference – to leave things a little better than when we came. We trust the Community Foundation to carry out our wishes. Our giving has evolved to include our family, that’s icing on the cake.”

—Joel and Dena Gambord
Joel and Dena Gambord Charitable Foundation, a donor advised fund of the CFMC

Music. Arts. Youth. Environment. Education. Whatever your passion, we can help you design a giving plan to meet your goals.

Donor Advised Funds • IRA Charitable Distributions
Family Philanthropy • Charitable Estate Planning (CGAs, CRTs)
Scholarships & more

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Dena and Joel Gambord
Read their story: cfmco.org/Gambords
CARING

“I wanted to contribute to the organization that is taking care of my son and others like him. I feel some peace of mind knowing that even if I’m not here, I will have left behind a small part of me. I am confident he will be taken care of.”

— Maria Salazar Segovia
CFMC Legacy Society member

Maria Segovia established a Charitable Gift Annuity (CGA) with the CFMC to provide guaranteed income for herself during her lifetime and benefit the Gateway Center in the future. Read her story: cfmco.org/Segovia.

Design your philanthropic vision. We can help.

Donor Advised Funds • Family Philanthropy
Charitable Estate Planning (including Life-Income Gifts – CGAs, CRTs)
IRA Charitable Distributions • Scholarships

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LEGACY

“No matter how much, it’s important to give back. I can’t imagine anything greater for John, than to continue his legacy of educating kids.”

— Mari Myszak
The John S. Myszak Scholarship for Future Teachers of the CFMC

Read her story: www.cfmco.org/Myszak

Design your philanthropic vision. We can help.

Donor Advised Funds • Charitable Estate Planning (CGAs, CRTs)
IRA Qualified Charitable Distributions, Scholarships & More

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"An excellent education is the foundation of a free and fair society. We are proud to support children of our valued team members with academic scholarships to pursue their college dreams." – Bruce Taylor, Chairman & CEO, Taylor Farms, Taylor Farms Scholarship Fund of the Community Foundation for Monterey County

Design your philanthropic vision. We can help.

Donor Advised Funds • Charitable Estate Planning (CGAs, CRTs) • IRA Qualified Charitable Distributions • Scholarships & More

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Annual Report
Newsletter

Giving Matters
COMMUNITY FOUNDATION FOR MONTEREY COUNTY NEWS

Giving by Design
What are your interests, values and causes you care about? How do you share them with your family and the world? The Community Foundation for Monterey County (CFMC) helps donors develop their unique visions, and customize a giving plan that works for them.

Whether it's meeting an immediate need such as giving to natural disasters like California wildfires, creating a donor advised fund to streamline giving or donating a piece of real estate to leave a charitable legacy, the CFMC can help clarify solutions to focus and simplify giving.

“We are retired teachers with a modest estate, yet we can still take part in doing good in this world.” —Barbara Brooks

Transforming Real Estate into Income and Giving
Did you know that you can donate real estate or other complex assets to the CFMC to benefit your favorite causes? The CFMC has handled real estate gifts from Orange County to Hawaii.

Recently Steve and Barbara Brooks partnered with the CFMC to donate their Carmel rental property to create a Charitable Remainder Trust (CRT).

“The Brooks were delighted to be able to increase their income and use their property for a charitable purpose that was very meaningful to them,” said Christine Dawson, CFMC Vice President of Philanthropic Services. The CRT will provide income to the Brooks during their lifetimes. Upon their passing, the remainder will create a charitable fund benefiting their favorite causes. Read their story at cfmo.org/Brooks.

Designing Your Philanthropic Vision
Senior Philanthropic Services Officer Brian Thayer and Philanthropic Services Officer Mackenzie Little recently became 21/64 Certified Advisors, learning the art of facilitating multi-generation family philanthropy meetings. Brian and Mackenzie engage donors in important conversations about values and philanthropy, using helpful tools to increase personal and generational awareness. These were put to use in a recent Family Philanthropy Workshop for fund holders (see page 7).

Phileanthropy Celebrated: Judge Villarreal Honored
Philanthropy starts with one person’s desire to help another. At the annual Celebration of Philanthropy that spirit was evident as Dan Babcock, CFMC President/CEO, spoke about the record grants made possible by unprecedented generosity.

“Grants come from assets. Assets are gifts and gifts come from people. So grants are people helping people,” he told more than 250 friends and supporters in attendance.

Continued on page 4
Composing a Legacy
Marty Wolf

A Vancouver, Washington native, Marty Wolf moved to the Monterey Peninsula after the sale of his business in 1991. Now that he is semi-retired, his love of music inspired him to think about how he could support musical programming to give others the joy it has given him. Marty shared his story with attendees of the 2019 Legacy Luncheon of the Community Foundation for Monterey County (CFMC).

“My mother was a violinist and I took up piano when I was about six. By the age of 13 I could play by ear,” said Marty, who had his own band from junior high through law school.

Charitable Gift Annuity – Income for Today, Gift for Tomorrow

Marty partnered with the CFMC to establish a charitable gift annuity (CGA). It was a complicated gift, involving a CGA for two lives, and a transfer of interest in an LLC that held an income producing property for sale in Oregon. Marty was simultaneously working on a similar gift to his alma mater, Williamette Law School.

“Dan Baldwin and Christine Dawson worked closely with my attorney and the Law school to bring all elements of the gift together. They and their staff were incredibly helpful in coordinating among all the parties. Through the CGA we receive payments for life, and my beautiful wife Francesca will be taken care of. The remainder will be used to support jazz and classical musical education and performance. We are confident the Community Foundation will carry out our charitable legacy in the future,” he said.

Giving Now – Donor Advised Fund
To enjoy giving now, Marty also created the Martin P. Wolf Family Fund, a CFMC donor advised fund. He and Francesca recommend grants to support programs and causes they care about.

Marty continues to immerse himself in music. He sits on the Monterey County Symphony Board of Directors, where he enjoys serving on a committee to select music for future concerts.

"As I reflected on how fortunate I am and how much law school and music meant to me, I wanted to pay it forward to others. I have a sense of responsibility for not only the future, but the past, too. “ - Marty Wolf

This newsletter shares stories of those who have made the important decision to include a charitable gift to the Community Foundation for Monterey County through their will or estate. We are honored to partner with you in your philanthropy, now and in the future.
Charles de Guigné Pebble Beach Estate Gift Creates $18 Million Charitable Legacy

"We’re honored Charles entrusted the Community Foundation for Monterey County with this extraordinary gift. We’re so pleased we were able to take a complicated asset and transform it into a fund that will forever support the causes he cared about." – Dan Baldwin, CFMC President/CEO

When Charles de Guigné passed away he left his beloved one-of-a-kind estate at 3200 17-Mile Drive in Pebble Beach to create a lasting legacy. Charles, who had no children, wanted his property to be used for a charitable purpose.

He specified through his trust that upon his death, title to the home be transferred to the Community Foundation for Monterey County (CFMC). He instructed the CFMC to sell the property so proceeds could be maximized for the benefit of others. The gift, a record for the CFMC, sold in November and will benefit the SPCA for Monterey County and Montage Health Foundation. Read how one man’s giving will continue in perpetuity. Read the full story.

Every Gift Matters
Giving Tuesday is Today - MC Gives! Makes it Easy
Website

- 43,000 Users in 2019
- 84% New
- 64% Female, 36% Male
- 16% Organic Search
Blogs

- President’s Blog
- Donor stories
- Grants and Impact
- Shared in social media

President’s Blog: Front Row Seat to Generosity
December 20, 2019
By Dan Baldwin, President/CEO Community Foundation for Monterey County. In a joyful time of year what could be more appropriate than emphasizing the joy of giving? The Community Foundation for Monterey County has the pleasure and honor of working with many folks who use philanthropy to invest in the people of Monterey County. We have a front row seat in...

President’s Blog: Philanthropy as a Force for Good
October 1, 2019
By Dan Baldwin, President/CEO. Community Foundation for Monterey County. Fasten your seatbelts... if the past several years produced anxiety about the ability of our governmental systems and civil society writ large to hold fast in the face of unprecedented discourse and underhanded tactics, the next year or so could be overwhelming. A lot of what creates sleepless nights is a...

President’s Blog: Passion + Community = Impact
June 13, 2019
By Dan Baldwin, Community Foundation for Monterey County. President/CEO. Thomas Friedman famously wrote that PQ (Passion Quotient) + CQ (Curiosity Quotient) = IQ (Intelligence Quotient). If you ever get the chance to hear him speak on this, take full advantage; it’s captivating and energizing. With apologies to Mr. Friedman, I’d like to offer a variant for community foundations. The equation...
Social Media

3,284 Facebook Followers
1,520 Twitter Followers
814 LinkedIn Followers

(2/24/2020)
Share Stories of Impact

Adriana Vieyra: Aspiring for Success
Public Relations

De Guigne, Census 2020, Grantmaking, Celebration of Philanthropy and more
75th Anniversary

- **Graphics** - Designed new logo, letterhead envelopes – incorporating logo and messaging in invitations and all advertising
- **Media Outreach** - Secured articles in Carmel Magazine, Coastal Grower magazine and will be promoting widely to media
- **Web and Social Media** - Developing a web landing page, regular messaging
- **Expanded Celebration of Philanthropy** - Monterey Conference Center (new location) October 23 - SAVE THE DATE!
- **Promoting Fund for Monterey County** – inviting people to partner with us
How You Can Help - Be Ambassadors!

• The CFMC is celebrating 75 years of impact
• We have granted more than $205 million to hundreds of nonprofits in Monterey and beyond
• We are a design studio for philanthropy, connecting donors with their interests
• People partner with us to fulfill their philanthropic goals, in their lifetime and estate
• We are made up of more than 550 charitable funds created by generous individuals, families and businesses
• The CFMC has been entrusted with more than $290 million in charitable assets
• A Community leader working on issues from homelessness to affordable housing
• Anyone can give/be a philanthropist. Contact Dan or Christine!

We are: “Here for Good”
How You Can Help - Be Ambassadors!

- Like, share and comment on social media channels
- Attend Women’s Fund Lunch - May 12, 2020
- Attend Celebration of Philanthropy - October 23, 2020
- Refer people to Dan or Christine
Thank you for your support!