

Community Foundation for Monterey County

About Us – Here for Good



The Community Foundation for Monterey County (CFMC) is a nonprofit created by and for the people of Monterey County. Its mission is to inspire philanthropy and strengthen communities. Hundreds of generous families, individuals and businesses have chosen to partner with the CFMC by creating charitable funds in their lifetimes and through their estates. The CFMC stewards these assets and makes grants to nonprofits working to improve lives in Monterey County and beyond.

Grantmaker and Community Leader

- The CFMC grants more than \$35 million each year to strengthen our communities. The foundation meets changing community needs through the Fund for Monterey County and provides resources and support beyond grantmaking through the Center for Nonprofit Excellence and Community Impact Investment.
- The CFMC is a community leader working on important issues such as COVID-19 relief and recovery, homelessness and affordable housing to create healthy, safe, vibrant communities throughout Monterey County.

Partner in Giving

- The CFMC helps each donor or family create their unique giving plan and leverage their giving for greater impact.
- Customized giving solutions provide a variety of options for individual and family philanthropy, including donor advised, scholarship or other charitable funds.
- You can make a bequest or establish a named fund with a wide variety of assets including: cash, stocks, bonds and mutual funds; real estate; life insurance; IRAs and other retirement assets; closely held securities and more.
- The CFMC connects donors with grantmaking opportunities to support causes in their areas of interest.
- Charitable estate planning helps donors leave a legacy through planned giving.
- Private foundation services offer administrative and grantmaking support.
- Corporate philanthropy programs help companies give back.
- The CFMC is a trusted steward of charitable assets and our donors' intent.

“The CFMC 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



William H. Tyler III, fund holder, Legacy Society member and 2016 Distinguished Trustee Recipient

The CFMC offers a variety of giving options to help you achieve your philanthropic goals. To integrate charitable giving into your financial planning, please give us a call at 831.375.9712.

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Top 10 reasons to give through the CFMC:

- 1** We are a local organization with deep community roots.
- 2** Our professional staff has broad expertise regarding local issues and needs.
- 3** We provide personalized service tailored to each individual's charitable and financial interests.
- 4** Our funds help you invest in the causes you care about most.
- 5** We accept a wide variety of assets and can facilitate even the most complex gifts.
- 6** We partner with professional advisors to create highly effective approaches to charitable giving.
- 7** We offer maximum tax advantage for most gifts under federal law.
- 8** We multiply the impact of gift dollars by pooling them with other gifts and grants.
- 9** We build endowment funds that benefit the community forever and help create personal legacies.
- 10** We are a community leader, convening agencies and coordinating resources to create positive change.



Mission

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

Vision

Healthy, Safe, Vibrant Communities

Values

We **advance positive change** through grantmaking, community engagement and collaboration.

We **build a legacy for future generations** through responsible stewardship of the resources entrusted to us.

We **operate with the highest standards** of integrity, ethics and accountability.

We **embrace diversity, equity and inclusion**.

We **commit to fairness and respect** for the dignity of all people.

We **are open and honest** with our philanthropic partners, grantees and the community.

We **strive for excellence** in all that we do.

2021 Highlights:

\$36.6 Million	granted to nonprofits in Monterey County and beyond
\$268 Million	in cumulative grantmaking since 1981
\$1.5 Million	in scholarships awarded to 375 students
13%	investment return for long-term portfolio through 12/30/21 (Medium-Term 13.1%, ESG 12.1%)
670	charitable funds established by individuals, families and businesses
\$44.8 Million	received in new contributions from more than 6,500 gifts
\$385 Million	total assets
Top 100	in Community Foundations in U.S. (asset size, 2021)

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