



10 REASONS for Our Foundation to be your Foundation

1) OUR FOCUS IS PALM BEACH AND MARTIN COUNTIES AND THE SURROUNDING AREAS.

Your home, your family, your successes, and your passions are right here where the Foundation is headquartered. We share your devotion to positively impacting our community and have strong relationships with most of the active non-profit organizations in our area.

2) YOUR INTENTIONS ARE OUR PRIORITY.

Why, how, when, and where you want to direct your philanthropic attention is our top priority. We can find creative solutions to your philanthropic planning, making sure your intentions are honored now and into the future.

3) FAMILY MATTERS.

We are sensitive and responsive to the various needs and interests of family members. We can help facilitate family dialogues and address practical matters that will affect assets for decades to come.

4) YOUR ADVISORS ARE ESSENTIAL.

We work closely with your legal, financial, tax and other advisors to ensure the success of your philanthropic plans.

5) TAX ADVANTAGES.

As a public charity, the Foundation offers maximum tax advantage for most gifts under federal law.

6) STERLING REPUTATION FOR EFFECTIVENESS.

Helping donors identify and deploy the “highest and best use” of philanthropic assets positions the Foundation as a consistent resource for expert service and reliability.

7) PROFESSIONAL ASSET MANAGEMENT.

Whether you choose to invest your funds through the Foundation’s investment managers or your own, due diligence is performed to preserve the investment structure of your philanthropic assets.

8) EXPERTISE ACROSS THE PHILANTHROPIC SPECTRUM.

From managing complex asset portfolios to assessing diverse family and community needs, we have expert staff that can address a full range of challenges faced by philanthropic families.

9) INCREASED LEVERAGE.

The Foundation can multiply the impact of your giving by pooling and amplifying it with other gifts and grants.

10) ENSURE YOUR PERSONAL LEGACY. FOREVER.

You can secure your future control over the disbursement of your philanthropic assets held by the Foundation.

The Path to Perpetuity

Donor Directed Impact

To ensure maximum impact, the primary directive of every philanthropist, we assist donors with:

EFFICACY distinguishes the greatest philanthropists because it shifts the conversation from the actual gift to its impact. Why we give and what happens as a result of our giving, is more meaningful than the amount of our gifts. Philanthropists are most effective when they focus on outcomes.

DIRECTION of how assets are disbursed can become increasingly elusive in successor generations. We listen to your interests and intentions and ensure that your philanthropy will be directed accordingly.

PERMANENCE is the most desirable outcome for any philanthropist. Working with the Community Foundation, you can ensure your intentions are secured, documented and honored for generations to come.

PATH 1 | NOW

YOUR PRIVATE FOUNDATION.

We can provide multiple advantages to converting your private Foundation into a permanent vehicle. Moving the entirety or portion of your private foundation into a fund at the Community Foundation allows you to:

- Minimize administration
- Maximize tax benefits
- Leverage giving
- Perpetuate effect
- Reduce costs
- Ensure initial stated intentions

PATH 2 | LATER

YOUR ESTATE.

An endowment can be established through a bequest from your estate, allowing your philanthropy to continue after your estate is settled. The Foundation will ensure the enforcement of your perpetual philanthropic legacy.

YOUR FUND OPTIONS FOR PERPETUAL GIVING

The experts at the Community Foundation can consult with your advisors to determine the optimal arrangement for your philanthropic goals and preferences. Your fund options include:

- **A donor advised endowment fund** is a permanent fund managed by the Foundation that directs its income according to your documented ongoing recommendations. Up to two generations of successors may be involved in the distribution of fund assets.
- **A field of interest fund** is a permanent fund managed by the Foundation through which your philanthropic priority area will be forever supported. Choose any charitable category, as narrowly or broadly defined as you like, and the Foundation will make grants that honor your interests.
- **A discretionary fund** is a permanent fund managed and directed by the Foundation. The fund's income will be directed to a most pressing need at the discretion of the Foundation.

YOUR PRIVATE FOUNDATION converts to

YOUR ESTATE eventually funds

DONOR ADVISED ENDOWMENT FUND

or

FIELD OF INTEREST FUND

or

DISCRETIONARY FUND



COMMUNITY FOUNDATION
for Palm Beach and Martin Counties

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