



Partnering for Good Professional Advisor Toolkit



Welcome

YOUR CLIENT'S VISION. OUR COMMUNITY CONNECTIONS. PARTNERS IN PHILANTHROPY.

Love your client? We do too!

The Community Foundation for Palm Beach and Martin Counties is your go-to resource for fulfilling the philanthropic vision of your clients. Whether they live, work, or vacation here, if your client wants to make a difference in this region, we are here to help.

You've built a trusted relationship with your client. We've built a trusted relationship with your client's community. We know the organizations, initiatives and people effectively addressing the region's most pressing issues.

We collaborate with you to create personalized, highly effective charitable giving strategies that reflect your client's values, passions, and goals, elevating their philanthropy's impact and creating long-lasting, meaningful, and targeted impact.

2022 CHARITY NAVIGATOR
RATING FOR **FINANCE AND
ACCOUNTABILITY**

100
out of
100

**\$200
Million**

Since 1972, we have distributed more than \$200 million in grants and scholarships, helping people and programs reach their potential.



THE COMMUNITY FOUNDATION DIFFERENCE.

Founded in 1972, the Community Foundation combines a deep connection to our local community with trusted financial leadership.

The result: We are uniquely situated to help direct resources effectively and efficiently to address the evolving needs of our community.

We provide strategies and consultation tailored to your client's vision and objectives, informed by the depth of knowledge from five decades of working with community partners.

We are dedicated to investment oversight and attention to administrative and compliance details.



Our Values

IMPACT

We deliver community-wide impact and significantly improve people's lives.

COLLABORATION

We partner to advance shared goals and accomplish more together.

EQUITY

We value, respect, are inclusive of, and strive to improve outcomes for all people in our community.

INTEGRITY

We act ethically, honor our commitments, and apply rigorous oversight to ensure we are trustworthy.

EXCEPTIONAL SERVICE

We customize our support to meet and exceed the needs of our donors and partners.

WAYS OF GIVING.

Every day we work closely with professional advisors to craft effective giving strategies that realize the philanthropic goals of your clients.

The Community Foundation offers several ways to help you fulfill your vision for a better world, now and forever. We can help you support an individual initiative or address an issue through a variety of approaches, and partner with multiple generations to develop a long-term strategy.

Working together, we help strengthen your return on investment in the community.

GIVING NOW

THE COMMUNITY FOUNDATION PROVIDES REGULAR STATEMENTS ABOUT PERFORMANCE THAT ARE AVAILABLE ONLINE AND OF GRANTS DISTRIBUTED FROM THE FUND.

DONOR-ADVISED FUNDS (DAF)

A simpler, more flexible and more efficient alternative to creating a private foundation. You can contribute as often as you would like and receive the maximum tax deductions allowed.

A donor-advised fund can support the causes and communities that matter most to you, while the Community Foundation administers grants to your preferred charities (local or national).

FIELD OF INTEREST FUNDS

If you have a strong interest such as education, animal welfare, mental health etc., this type of fund, might be a particularly good fit. Field of Interest funds allow the Community Foundation to make grants to the greatest need within your field of interest.

DESIGNATED FUNDS

If you have a passion for a specific nonprofit and its mission or a specific area such as education, arts and culture, the environment and animals, health and human services, religion, or even a geographic area, this is the fund for you.

EDUCATION AND SCHOLARSHIP FUNDS

Education and scholarship funds allow you to honor a loved one or a specific population of students, while giving back to the community with scholarships for education.

COMMUNITY IMPACT FUNDS

Established by the Foundation, with community partners, based on pressing needs in the region that require a multi-faceted solution.

SUPPORTING ORGANIZATIONS

A private foundation provides independence and influence, fewer restrictions, and maximum tax benefits.

INDIVIDUALLY MANAGED ACCOUNTS (IMA)

An IMA allows the financial advisor to manage the charitable assets of their client after a Donor-Advised Fund is established.

GIVING LATER

THE COMMUNITY FOUNDATION FOR PALM BEACH AND MARTIN COUNTIES WELCOMES PLANNED GIFTS, WHICH MAY BE PART OF YOUR OVERALL ESTATE PLANNING. SOME TYPES OF PLANNED GIFTS PROVIDE LIFE-LONG INCOME WHILE HELPING TO MINIMIZE THE IMPACT OF PHILANTHROPY ON THE DONOR'S ESTATE.

LEGACY FUNDS

Establish a fund on paper now and activate it at a specific point in time, whether through the sale of a business or a designation in your will.

CHARITABLE REMAINDER TRUSTS

A charitable remainder trust enables people to receive income for the life of the trust, with the remainder of the donated assets directed to your philanthropic goals.

CHARITABLE LEAD TRUSTS

A charitable lead trust enables you to make significant charitable gifts for a period of time, with remaining assets transferring to family members or other beneficiaries later.

What our partners say about us.

“I enjoy working with the Community Foundation because they are local. Their people are local, their philanthropic perspective is local, and they are a resource not just to donors and professionals in the community, but also to the not-for-profit organizations that serve our community.”



John C. Castronuovo,
Senior Vice President Wealth Management
UBS Financial Services, Inc.



“Helping donors match their passion with a particular cause is one of the most valuable features of the Community Foundation. Oftentimes potential donors are overwhelmed by the crowded philanthropic landscape, which appears to be flooded with competing interests seeking the same dollars for what appears to be the same mission. The research capacity, human capital and experience of the Foundation help the donor sort through the morass of ‘asks’ and allows them to hone in on the cause that genuinely matters to them.”

James A. (Jim) Ballerano, Jr.
Attorney at Law
Day Pitney LLP

CHARITABLE INSTRUMENTS.

We are committed to understanding your unique interests and financial circumstances.

We accept a wide range of assets for investment:

CASH

A simple way to give that provides an immediate tax deduction.

APPRECIATED SECURITIES

We accept closely held and publicly traded stock. Give appreciated stock or mutual fund shares that you have held for more than one year and avoid capital gains taxes and earn a charitable tax deduction based on the market value.

REAL ESTATE

If held for more than a year, real estate usually provides the same tax benefits as gifts of securities.

OTHER ASSETS

Includes gifts of art, jewelry, and non-cash items.

LIFE INSURANCE

You can name the Community Foundation as the owner and beneficiary of a policy or retain ownership and name the foundation as a primary or contingent beneficiary.

IRAS AND OTHER QUALIFIED RETIREMENT PLANS

Heirs may realize substantial tax savings if you name a charitable fund as beneficiary of your retirement plan. Name charities to benefit from your fund or name heirs as advisors.

PARTNERSHIP INTERESTS

We consider gifts of limited liability company interests and limited partnership interests.

BEQUESTS AND TRUSTS

Establishing a charitable fund through a will or other giving vehicle is simple, minimizes estate taxes and can be advised by heirs. Contact us for sample language.

SALE OF A BUSINESS

Our team can suggest several ways to structure a charitable gift to help you reduce capital gains tax and maximize impact to the community.

CONVERT A PRIVATE FOUNDATION

There are several benefits to converting a private foundation that we are happy to discuss.



FULL-SERVICE PHILANTHROPY.

The Community Foundation has a suite of personalized services that can help you accomplish your short-term goals and a lifetime of impact.

PHILANTHROPIC PLANNING

Mission and vision statement development, family meeting facilitation, customized trainings.

EDUCATION AND OUTREACH

Customized strategies for personalized impact and research.

GRANTMAKING AND EVALUATION

Complete grantmaking and evaluation services, customized site visits, application reviews and more.

LEGACY AND SUCCESSION

Succession planning, legacy fund preparations.

ONLINE SERVICES

Access to monthly fund statements.

FINANCE AND INVESTMENT

Private meetings with our Chief Financial Officer or OCIO.



THE POWER OF PARTNERSHIP: REBOUND & RECOVERY

The Community Foundation can identify and strengthen programs to help meet your client's philanthropic vision and create lasting change. The Rebound & Recovery initiative is just one example.

The Community Foundation convened a partnership between Florida State University's School of Social Work and the Boys & Girls Clubs of Palm Beach County to help our area's children and teens — and their parents and caregivers — build resilience through tough times. The resulting initiative, Rebound & Recovery, uses a cognitive-based therapy model that helps children learn how to regulate their emotions and understand how their thoughts, feelings, and actions work together.

The Boys & Girls Clubs sent 38 employees from nearly all Palm Beach County clubs through training with FSU's experts. To date, more than 1,500 children have experienced the transformative power of the program: 96% showed improvement in their emotional identification and regulation skills.

Still, there are thousands more who need its tools to thrive.

Working with our philanthropic partners, the Community Foundation has underwritten the development and launch of Rebound & Recovery in Palm Beach County. The Stoops Family Foundation, led by local philanthropists Aggie and Jeffrey Stoops, provided the lead gift for the Palm Beach County initiative. Additional support from Julie Fisher Cummings has bolstered the initial investment; Christina and Benjamin Macfarland III's gift helped to tailor the curriculum to teens.

LEADING FOR GOOD.

With a \$50,000 seed gift, Winsome and Michael McIntosh started the Community Foundation in 1972 after moving to Palm Beach from New York City in 1972. Their goal was to build a charitable endowment that would meet the changing needs of the community in perpetuity.

For five decades, the Community Foundation for Palm Beach and Martin Counties has been meeting that mission. Working together, we help amplify philanthropy to build a stronger, more resilient community.



WINSOME AND MICHAEL MCINTOSH



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