Giving for Good

Donor Toolkit

COMMUNITY FOUNDATION
FOR PALM BEACH AND MARTIN COUNTIES
Since 1972, we have distributed more than $200 million in grants and scholarships, helping people and programs reach their potential.

ELEVATE THE IMPACT OF YOUR PHILANTHROPY.

You're ready to make a greater difference in your community. The Community Foundation for Palm Beach and Martin Counties is here to partner with you to bring your vision to reality.

At the Community Foundation, relationships are at the heart of what we do. Whether you live, work or vacation here, if you want to help improve our region, we are here to elevate the impact of your philanthropy.

Our team fulfills an essential role: helping develop and execute your philanthropic vision. We work closely with you every step along the way so that you can feel good while doing good. We know the organizations, initiatives and people that are effectively addressing the region’s most pressing issues. And we take the time to understand what matters most to you. We know that making a real difference requires real relationships.

We have the tools and expertise to invest your resources effectively and responsibly. Together, we can create a personalized strategy to create long-lasting, meaningful, and targeted change in our community.

Welcome
The Community Foundation helps families and individuals realize the potential impact of their philanthropy. 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 expert consultation tailored to your vision and objectives, informed by the depth of knowledge from five decades of working with community partners. Our dedication to investment oversight and attention to administrative and compliance details have helped us develop a legacy of trust and reliability in the community.

**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.

100 out of 100
2022 CHARITY NAVIGATOR RATING FOR FINANCE AND ACCOUNTABILITY
I have been an investor and a client of the Palm Beach Community Fund for a number of years now and I have found them to be so helpful to me with taking care of managing my fund and distributing to the charities closest to my heart. I trust them implicitly.”

– Mary McDonnell Davidson

After retirement, we looked for the best way to handle charitable giving. We knew we wanted to have a structured way to give back to the community. We found the answer in 2012 by establishing multiple funds with unique charitable intentions that work toward the same goal. As a result, we can support organizations doing important work, as well as support some of the Community Foundation’s important targeted programs.”

– Eddie and Jo Ann Sears
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.

APPRCIATED 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 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

561.659.6800
700 South Dixie Highway, Suite 200
West Palm Beach, FL 33401
yourcommunityfoundation.org