

# We Offer:

## Philanthropy your way.

Our team will work with you in whatever way you prefer, offering just the blend of services, expertise and involvement that you desire. We can help you find charities that are right for your giving goals - or facilitate philanthropy to non-profits you have chosen. We can provide investment expertise, or work hand-in-hand with your established wealth manager.

## Community insight, global outreach.

The Foundation's longstanding community presence gives us a unique, intimate perspective on this area's charitable landscape. Our resources also offer in-depth insight on non-profits and institutions with a regional, national or global reach. We can provide you with key information regarding each organization's vision, impact and sustainability.

## A proven track record.

Since its founding in 1988, The Foundation has awarded millions of dollars in grants to hundreds of non-profit organizations and religious and academic institutions throughout the Treasure Coast and beyond.

## A team of experts.

You'll benefit from the knowledge and oversight of our professional team of leading philanthropic, wealth management and legal experts. At your direction, The Foundation will partner with members of your existing advisory team, including wealth managers, estate planning attorneys, CPAs and trust officers. We'll keep you informed through regular quarterly fund performance reports and performance assessments of the charities you support.

## Tax advantaged gifting.

The Foundation creates individualized gifting plans that maximize charitable giving and deliver significant bottom-line benefits. A fund also provides an elegant alternative to a private foundation. There is no minimum granting requirement imposed by the IRS on a fund established at The Community Foundation. Because we are a public charity, our fundholders receive the maximum tax deduction allowed by law and avoid capital gains tax.

## Three Simple Steps

### ESTABLISH

your fund and receive an immediate tax deduction



+



+



Cash

Stock

Other Assets

### GROW

your charitable dollars by investing



with Your  
Financial Advisor

OR



in Our  
Investment Pools

### GRANT

to your favorite 501(C)(3) public charities



Human  
Services



Universities



Religious  
Institutions



Favorite  
Causes