

# Value Added

- ✓ *No Set-Up Cost*
- ✓ *Set-Up in 24 Hours*
- ✓ *No Minimum Contribution Required*
- ✓ *Administrative Support*
- ✓ *Ability to Work with External Wealth Management Advisors*
- ✓ *High Volume Transaction Processing Experience*
- ✓ *No Annual Minimum Distribution Requirement*

	TCF	PRIVATE FOUNDATION	FIDELITY
Personal Philanthropic Guidance	✓	✓	Telephone support only
In-Depth Reporting and Research, Including Site Visits	✓		
Connections to High Impact Programs/Projects	✓		
IRA Distribution Deposits Permitted	✓		
Fully Customized Concierge Service	✓	✓	
No Separate Tax Return Required	✓		✓
In-Depth Knowledge of Local Charitable Landscape	✓		
Follow-Up to Grant Awards	✓		
Anonymous Giving Possible	✓		✓

## TAX ADVANTAGES

Tax Treatment of . . .	TCF	PRIVATE FOUNDATION	FIDELITY
Cash	Up to 60% AGI	Up to 30% AGI	Up to 60% AGI
Publicly Traded Securities	FMV up to 30% AGI	FMV up to 20% AGI	FMV up to 30% AGI
Real Estate and Closely Held Stock	FMV up to 30% AGI	Cost basis of FMV or 20% AGI, whichever is lower	FMV up to 30% AGI

# Three Simple Steps

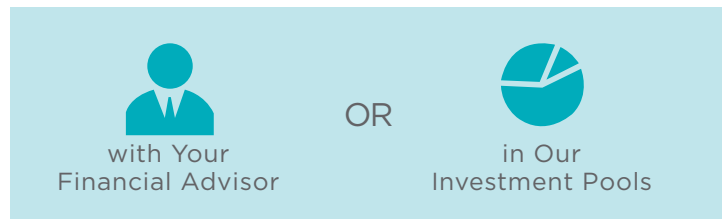
## ESTABLISH

your fund and receive an immediate tax deduction



## GROW

your charitable dollars by investing



## GRANT

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



**THE  
COMMUNITY  
FOUNDATION**

MARTIN  
ST. LUCIE

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