

BENEFITS OF WORKING WITH THE COMMUNITY FOUNDATION OF COLLER COUNTY TO ESTABLISH A DONOR ADVISED FUND

1. We have 30 years of experience connecting donor to community needs and providing leadership critical to community issues.
2. The Community Foundation provides the infrastructure and expertise on gift management, finance and fund administration to maximize the impact of your client's Fund in pursuit of your client's specific charitable and philanthropic goals.
3. By acting in partnership with the CFCC, your client will have unique opportunities to learn about philanthropy from a knowledgeable team who can make recommendations specific to your client's areas of interests and passions. Your clients will have access to our comprehensive non-profit directory complete with easily accessible detailed information about local non-profit organizations and our advice concerning these non-profits.
4. Establishing the fund is cost quick, easy and cost effective.
5. Your client will have access to Donor Central- a privacy protected online service that will allow them to check the fund balance, view fund statements, view grant history, research new grant opportunities and recommend amounts of grant payments
6. Your clients will receive the maximum tax advantages allowed by law. CFCC is a 501(c)(3) public charity and is fully tax exempt. No annual fund payout is required. Individual funds are not required to file returns. CFCC files all IRS reports and obtains annual independent audits.
7. Individual donors or grants can be kept private. CFCC can serve as a buffer between donor and grant seeker.
8. You will have the opportunity to network with an influential group of advisors through participation with our Professional Advisor Council.
9. You will have the opportunity to network with community leaders through our spotlight on Needs program series.

(For more information concerning the grant making and distribution process, please reference the Donor and Corporate Advised Funds Handbook.)

HOW WE INVEST YOUR CLIENT'S GIFTS

The assets of your client's Fund are co-mingled with those of the Community Foundation. The diversified portfolio and cost –efficiencies provide economies of

scale that benefit your client. The CFCC fund assets are managed by consultants and managers under the supervision of our Investment Committee comprised of highly respected business and financial leaders in our community.

(If your client's fund is over \$1million, your client may request use of a specific money manager as long as the money manager uses the Community Foundation's Investment Policy, meets our exacting criteria for Financial Partners, and is approved by our Board of Trustees.)

FEES

Fees consist of a quarterly investment fee to cover costs incurred by CFCC to cover the particular operational costs of each particular fund, and an administrative fee charged by the Investment Managers to manager the particular fund. All returns are expressed net of fees. CFCC does not charge a transaction fee for new contributions, for distributions to charities or for regular administrative support by our staff.

TESTIMONIALS



Ed Wollman, Attorney at Wollman, Gehrke & Solomon, P.A. and Community Foundation Professional Advisor, explains how to leave a lasting legacy through estate planning

“The Community Foundation of Collier County (CFCC) is a beautiful way to positively impact nonprofit organizations beyond your lifetime. Frequently, our estate planning clients hope to leave an impactful and meaningful legacy, but they haven't fully decided which charities they wish to enrich.

CFCC's mission is to improve the quality of life in Collier County by connecting donors to community needs and providing leadership on critical community issues. For the past 30 years, this public, tax-exempt charitable foundation has focused and increased personal philanthropy in our area with generous community support.

You may want to consider leaving CFCC a percentage of your estate that you wish to leave to charity per your Last Will and Testament or your Revocable Trust. Donors can establish a charitable fund in their name or of the name of a loved one and be personally involved in recommending the uses of their gift.

The first step is filling out the CFCC form, indicating which charities or categories of special interest that you wish to support. A complete Nonprofit Directory is available on their website and professional advisors can assist with advantageous tax structures.

Giving through the CFCC also eliminates the need to go back to your attorney, spending time and money with changes. You can easily adjust your selected charities or areas of interest by going online – or in person – and updating the CFCC form.

Darrell Hendrickson was a client who wanted to leave a lasting legacy in our community, but wasn't certain who would ultimately benefit. He visited the CFCC office and with their guidance was able to make his charitable selections. Sadly, Darrell passed away far too early, but his memory remains alive through the philanthropic work of the CFCC."