

The Community Foundation:

Connecting Donors Who Care With Causes That Matter

THE COMMUNITY FOUNDATION can bolster and strengthen your generosity by helping you channel it to organizations that are doing community work you want to support. Since 1997, individuals, families, and corporations have used our expertise to improve the quality of life in Weld County and beyond. By helping you choose the type of fund that best fits your charitable goals and then handling the administrative details for you, the Foundation empowers your generosity to be flexible and immediately significant. In this way we embrace and empower the diverse beliefs, perspectives and experiences of all people while aspiring to excellence in our unending civic mission.

How We Do It

A COMMUNITY FOUNDATION is a tax-exempt public charity that helps you accomplish your philanthropic goals through a named charitable fund. The funds are managed professionally and endowed assets will grow over time. Three features differentiate a community foundation from other forms of organized philanthropy.

- **PERSONALIZED SERVICE**—we help individuals and families achieve their charitable goals by offering tools and resources that make giving easy, flexible and effective.
- **LOCAL EXPERTISE**—we have a knowledge of the local issues and needs that allows us to help you make your giving as effective as possible.
- **COMMUNITY LEADERSHIP**—we act as a community catalyst, bringing diverse voices and groups together to address issues, fostering greater giving and supporting high impact opportunities.

VISIT THE COMMUNITY FOUNDATION'S website at www.cfsgwc.org and learn more about our services and philosophy. Call us at (970) 304-9970 to request more information or speak with a professional who can help you maximize the impact of your charitable giving.



Making philanthropy and its benefits available to all

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Serving Greeley and Weld County
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**The Community
Foundation**
GREELEY AND WELD COUNTY



For Good. For Ever.

STRATEGIC IMPACT. With ten years of experience in the community, the Community Foundation can help you target your resources for greatest impact and assist you in achieving your charitable objectives.

TAX BENEFITS. As a public charity, we offer the highest level of tax benefits for charitable giving. Almost any kind of asset can be used to start your fund, such as cash, publicly traded securities, closely held stock, real estate, life insurance and private foundation assets. We can also discuss other options with you, such as bequests and charitable trusts.

EASY SET-UP AND ADMINISTRATION. Establishing a fund can be done in less time than it takes to open a bank account. We take care of all of the administrative and grantmaking activities, eliminating the need for you to set-up a separate institution, formulate policies, file innumerable forms and monitor the status of grant recipients.

PERSONALIZED INVOLVEMENT. We are experts in working with donors and their families to design grantmaking programs tailored to help you meet your charitable objectives. We'll help you learn about the issues of most importance to you and will connect you to like-minded organizations, resources and donors.

GEOGRAPHIC FLEXIBILITY. The primary focus of the Foundation is Weld County. However, grants may go to organizations anywhere, provided that we can confirm the charitable status of the grantee.

A CHARITABLE LEGACY. When you create a permanent endowment fund, it benefits the community for generations to come.



1. **DECIDE** to give

Create a charitable fund now, establish it in your will, or create it through a trust arrangement that benefits your family as well as charity. You may give in honor of an anniversary or to celebrate a special event. Tax deductions are earned at the time of your gift, while grants awarded from your fund will continue into the future.

PHILANTHROPY SHOULD BE A JOY, not a burden. Use the Community Foundation, its staff and its resources to make your giving simple and satisfying.

Here are some ways we can assist you:

- Managing the charitable fund you create; overseeing its investment; accounting; and maintaining tax records.
- Working with you to develop and implement a strategy for your philanthropy.
- Providing personalized grantmaking services, offering information about grant opportunities, and providing research/referral information on areas of particular interest to you.
- Issuing regular financial reports detailing the status of the fund.
- Consolidating your ongoing contributions through one charitable fund.

How Does it Work?

Assets that you donate to the Foundation create one of several types of funds to support your charitable goals. We offer you a full menu of giving options to tailor your gift. Direct your gift broadly or narrowly to specific issues that matter to you or to wherever the needs are greatest.

You can create a fund today and experience the impact your charitable giving will have on the community or make a long-lasting gift by creating a fund through a will.



2. **CHOOSE** a type of fund

We offer a variety of funds that will meet your philanthropic and family goals and are flexible enough to meet your different charitable interests. Stay involved in your giving by advising grants, supporting specific causes, or giving locally. Involve your family. Remain anonymous. It's up to you.

DESIGNATED FUND—*Provide ongoing support.*

Specify particular charitable agencies or organizations to receive the income from your endowed fund.

DONOR-ADVISED FUND—*Support annual giving.*

Our staff can work with you to identify charitable organizations addressing issues of importance to you, and you recommend grants to those charities you wish to support. The Foundation ensures the charitable status of beneficiaries and provides additional grantmaking and administrative support.

FIELD-OF-INTEREST FUND—*Address issues.*

You decide the general purpose of the fund, such as education, arts or health, and the Foundation identifies projects that are effectively accomplishing that goal through competitive grants.

SCHOLARSHIP FUNDS—*Provide students' educational support.*

Work with the Foundation to create the guidelines for students who can receive assistance from the fund.

UNRESTRICTED FUND—*Think broadly.*

Allow the Foundation to identify needs and opportunities in the community and target your dollars where most effective through competitive grants.

You can give any type of property—cash, stocks, closely held securities, real estate, or personal property—and receive maximum tax benefits. Furthermore, you can integrate your contributions with your overall financial and estate planning, maximizing tax advantages.



3. **NAME** your fund

Most funds are named for the donor or the donor's family or as a memorial to someone special. Every grant from the fund will carry this name. If you prefer anonymity, you may choose a name that reflects your fund's charitable purpose or one that ensures your privacy.