

# Planned Giving Services for Nonprofits



**Nonprofits that take full advantage of the Foundation's planned giving services** gain from a growing permanent source of income and our 30+ years of experience in professional investment management and gift planning.

**Planned Gifts** involve financial or estate planning by the donor, often resulting in tax benefits and larger gifts to the nonprofit. The Foundation can perform the complicated tasks of establishing and administering planned gifts, leaving you to focus on your mission.

**The Foundation's Planned Giving Services** provide the technical expertise and back-office assistance of closing and maintaining a planned gift, **at no charge**. Services include:

- Helping your donors to explore planned giving options that will benefit your organization, including tailored gift illustrations and income projections for beneficiaries.
- Full planned gift administrative services, including gift acknowledgements, tax receipts and annual distribution of tax forms, and transfers of all remainders into the donor's or your endowment.
- Investment and management of funds resulting from your donors' planned gifts.
- Access to our Endowment Building Through Planned Gifts Toolkit that provides guidance on starting a planned giving program or improving your existing one, including marketing materials and ideas that encourage your donors to establish planned gifts.
- Board and staff training to understand planned giving and endowment.

**The Foundation Can Also Manage Your Endowed and Reserve Funds.** You can outsource the administration of your endowed or other invested funds by establishing an agency endowed fund or a non-endowed agency flex fund at the Foundation. Services include:

- Comprehensive financial and administrative management of the fund.
- Superior investment performance.
- Charitable Gift Annuity services and administration.
- Acceptance of non-cash gift assets, such as real property, closely held stock or life insurance.

*(Continued on reverse)*

## Benefits for Your Donors

- Generous income, capital gains, estate and gift tax advantages
- Security of a lifelong income at high rates of return for themselves or their beneficiaries
- Opportunity to continue giving back to the community well beyond their lifetime
- An individual or family legacy or a memorial for a loved one
- Avoidance of the burdens of asset management
- Personalized service, including coordination with their professional advisors, that makes a potentially complicated process very simple
- Recognition for your donors, if they wish, as members of our prestigious Legacy Society, a select group of people whose generosity to your organization will extend across generations...and whom we are able to thank and recognize today
- Access to the deep local grantmaking knowledge of the Foundation



## Benefits for Your Organization

- Many additional and highly popular giving instruments to offer your donors, such as charitable gift annuities
- Professional, personalized service for your most important donors
- A partnership that increases donor confidence and builds you deeper, perpetual relationships with your donors
- Comprehensive legal, accounting, auditing and financial support services
- Resources to help you market planned gifts and identify prospects
- A secure source of permanent income
- Combining your fund with our assets of \$100 million affords you economies of scale, lower investment expenses, full diversification and professional independent investment consulting

**For more information, contact Sam Leask, philanthropic services director  
at 831.662.2060 or sleask@cfsc.org.**