



OVERVIEW OF BENEFITS & FUNDS

The Catholic Community Foundation provides “**FOREVER VALUE**” for Catholic organizations by establishing and growing endowments, providing Donor Advised Funds, and educating our Catholic community about Legacy Giving.

Our core value is providing donors the opportunity to participate in the development of funds that generate grants for our local and broad Catholic community.

Other Benefits of the Catholic Community Foundation:

- All funds managed under United States Conference of Catholic Bishops guidelines
- As a repository of grant requests for the local Catholic Community, we can inform donors about effective programs that would benefit from their support
- We partner with Colonial Consulting, various individualized investment managers, and a sophisticated investment committee to optimize investment returns
- We offer donors the option to *retain a private financial advisor* with a gift of ≥\$1 million
- We accept complex gifts such as real estate, operating partnership shares, charitable trusts, etc.

DONOR ADVISED FUNDS	FIELD OF INTEREST ENDOWMENTS
<ul style="list-style-type: none"> ○ Tax advantaged vehicle allowing for full charitable deduction in a specific year, with grants advised for up to two lifetimes ○ Grant to any qualified 501(c)3 in the US; does not need to be a Catholic organization ○ \$10,000 minimum initial gift ○ 1% annual fee ○ Minimum grant of \$250 ○ Online access to fund balances, grant history, gift history, database of grantees ○ Grants distributed within 30 days of request 	<ul style="list-style-type: none"> ○ Permanent support for an area of work that inspires you, e.g. youth ministry, social justice ○ Grants to local parishes, Catholic schools, Catholic organizations, and ministries ○ \$100,000 minimum initial gift ○ 2% annual fee ○ The grant cycle will begin after 9 months of investment experience ○ 3% - 5% of invested balance available to grant ○ Application cycle for grants opens annually; grants committee reviews all applications
FAMILY ENDOWMENT	DESIGNATED ENDOWMENT
<ul style="list-style-type: none"> ○ Permanent support for multiple organizations or ministries designated by a family ○ May be actualized in life or as a bequest ○ \$25,000 minimum to start ○ \$500 minimum grant to each beneficiary ○ Grants made annually in December ○ 3% - 5% disbursement amount per year ○ 0.5% annual fee 	<ul style="list-style-type: none"> ○ Permanent support for one ministry or organization ○ \$10,000 minimum initial gift (\$1,000 if designee is a parish) ○ 0.5% annual fee ○ Minimum investment balance for grant distributions: \$25,000 ○ 3% - 5% disbursement amount per year ○ Grants made annually in December



WAYS TO GET INVOLVED

Start a Donor Advised Fund

Donor Advised Funds (DAFs) offer flexibility in your charitable giving. We provide you with information about opportunities to meet needs in our Catholic community. Schedule time to discuss how you can move money to a DAF with us for immediate tax deduction and then decide later which charities you wish to support. Visit www.cfoscc.org/what-we-do/donor-advised-funds for more information.

Set up a Designated Endowment

Designated Endowments provide permanent support to a parish, school, organization, or ministry you love. From the endowment, we make annual distributions to that institution or ministry - **FOREVER**. The principle of the endowment is never drawn upon so the funds never expire. Visit www.cfoscc.org/what-we-do/endowments for more information.

Open a Field of Interest Endowment

Field of Interest Endowments provide ongoing support and reward good works in an area that inspires you, such as youth ministry, support for the elderly, liturgy, etc. From this endowment we make grants to specific projects that fit your definitions via an application cycle. Visit www.cfoscc.org/what-we-do/grants for more information about our Spring Grant Cycle.

Establish a Family Endowment

A Family Endowment allows individuals and families to leave a legacy of support for the Catholic organizations and ministries that impacted them during their life. Families can endow their annual giving, so that the gifts to the organizations they love will continue **FOREVER**. Contact the Foundation at info@cfoscc.org or 408.995.5219 for more information.

Consider us as a Partner in Legacy Planning

Direct your planned giving through us. We can manage distributions to named ministries and work with you on plans for creating one of the funds listed above that can continue your legacy through grantmaking **FOREVER**. Visit www.cfoscclegacy.org for more information.

Simplify Existing Family Foundations

To reduce administration and regulation complexity, consider transitioning to a Donor Advised Fund. There are no minimum distributions and no separate reporting requirements. If you want to keep your family foundation but sometimes find the 5% minimum distribution unwieldy, you can simply “spin” the 5% into a Donor Advised Fund with us, and then advise grants on your own schedule. Visit www.cfoscc.org/what-we-do/donor-advised-funds for more information.

Donate to an Existing Fund

Donors like you have already set up many funds to which you can simply make a donation of cash or securities. Existing funds include endowments for parishes, Catholic education, social justice, liturgical music, and many more. Visit www.cfoscc.org/what-we-do/endowments to see a full list of endowments to which you can contribute.