

Inspiring Growth in Philanthropy

THREE THINGS YOU SHOULD KNOW ABOUT



THE CATHOLIC
COMMUNITY FOUNDATION
OF SANTA CLARA COUNTY

1

Donor Advised Funds

High tech/high touch

- Fully online infrastructure
- Personal connection in desired areas

Ability to accept complex assets, such as:

- Cryptocurrency
- Real Estate

Choice of investment pool

- May stay with current investment manager for large fund

Grantees do not need to be Catholic or in Santa Clara County



2

Family Endowments

Providing *FOREVER VALUE* to key charities

Foundation provides:

- Family name remembrance annually
- Protection of intent
- Variance power

Eligible for QCD from retirement assets



3

Legacy Planning

Single “beneficiary” strategy

- Donors name the Foundation as their single charitable beneficiary and we distribute the gift according to their wishes

Legacy gifts made to DAFs for the next generation

- Donors can set up or add to existing DAFs to fuel philanthropy in the next generation

Can create endowed or non-endowed funds



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