

Gather

Grow

Give



### What is a Community Foundation?

A community foundation collects donations from community members, invests and stewards those gifts, and distributes grants for the benefit of that community. A community foundation does not do the work of providing services on the ground, but rather establishes and grows funds for the benefit of local programs and organizations. Community foundations are experts in long-term investing, complex gifts, and legacy giving.

#### Our Mission

# Gather | Grow | Give

We are committed to strengthening our Catholic community through fund development and grantmaking. It is our vision to be a partner in Catholic philanthropy, matching donor intent with unmet needs, and building *FOREVER VALUE* by acquiring and growing endowed funds. Through prudent investing of endowments, administration of donor advised funds, and education around legacy giving, the Foundation builds long-term support for vital ministries and organizations in our local community and beyond.



We grow the funds in our care through prudent and socially responsible investing



We grant from the funds in our care for the benefit of effective programs and organizations in our community and beyond

Broad and effective grant making is our highest

objective. Through grant making, we are able to

from financial insecurities to remain on Catholic ministry. Our grant making process ensures that

funds entrusted to the Foundation are used to

strengthen our community and allow focus to shift



Endowment

An endowment is a permanent fund invested for the benefit of a particular organization or purpose.

Annual grants are disbursed using the investment Endowments grant perpetually, providing **FOREVER VALUE** to the beneficiary.

Endowments can:

- ▶ provide financial security to an organization
- ensure that certain types of programs have funding every year
- create a lasting legacy for a family

catholiccf.org/endowments

# Donor Advised Fund

A Donor Advised Fund (DAF) is a flexible account that allows you to contribute to your fund, receive immediate tax benefits, and then recommend grants to charities all over the United States whenever you choose. It is an excellent tool for simplifying your current giving into one place.

catholiccf.org/donor-advised-funds

## Legacy Giving

Also known as planned giving, these gifts come after your lifetime. They are part of your estate plan, and the types of assets and giving vehicles vary widely. If carried out with discernment, a legacy gift becomes an expression of your deepest values and stewardship for the next generation.

catholiccf.org/give-later

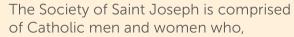
The Foundation ensures that your contributions receive the highest professional management and fiscal accountability, and that our investments are aligned with our Catholic values. We follow official guidelines for Catholic Investing and ensure our endowments are managed in compliance with endowment management laws.



We are committed to designing a strategy that maximizes investment results. Our goal is to grow each fund's total return to provide a steady stream of income that fuels grants, supporting both our mission and the mission of each beneficiary organization. catholiccf.org/investment-management

# Society of Saint Joseph

Have you remembered a local parish, parish school, ministry or the Diocese in your estate plan?



understanding the call to protect and preserve our faith for future generations, have made a commitment to name their local parish, a Catholic elementary school, the Diocese of San Jose, or any ministry of the Diocese as beneficiaries of a gift (of any size) in their wills or trusts, retirement accounts or life insurance policies.

These gifts make our Catholic institutions stronger, more sustainable, and better equipped to reach future generations with the message of faith, hope and love.

catholiccf.org/SocietyofSaintJoseph

Our Grants Support

▶ General operational support for parishes and other organizations

address the most important needs of the local community and

that the original intentions of the donors are always honored.

- ▶ Outreach programs that help feed the hungry and provide assistance to those in need
- ▶ Catholic ministries, including faith formation programs and vocations
- ▶ Catholic schools' operations and tuition assistance
- ▶ Non-Catholic organizations, including local outreach non-profits, national charities, and donors' alma maters catholiccf.org/grants



"We provide the County's largest annual health-fair which prepares the homeless, elderly and vulnerable for flu season. We are very grateful to the Catholic Community Foundation because we need your support in order to offer the level of service we provide for the community." Cathedral Clinic/John XXIII Health Center, Grant Recipient



# Are you a ...

#### Potential Donor

Donate to one of our existing endowments

#### catholiccf.org/endowments

Start an endowment or open a Donor Advised Fund to support the organizations you love

#### Call 408.995.5219 or email info@cfoscc.org

Let us know about a legacy gift you are planning for your parish, parish school, or the Diocese, and we will welcome you into the Society of Saint Joseph

Learn more and download the Legacy Gift Intention Form at catholiccf.org/SocietyofSaintJoseph

#### Professional Advisor

Estate Planning Attorney, CPA, Wealth Manager, etc.

Learn more about the Foundation's services and how we can meet your clients' needs

catholiccf.org/professional-advisors

# Organization Looking to Open a Fund or Apply for a Grant

Find out about the services we can provide for your organization and how to set up a fund

Call 408.995.5219 or email info@catholiccf.org

#### Contact Us

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The Catholic Community Foundation

