3 Things You & Your Clients Should Know About

THE CATHOLIC COMMUNITY FOUNDATION

1 Our Funds

Family Endowed & Non-Endowed Funds

- Provide ***FOREVER VALUE*** to key charities with endowment or custom granting timeline/payout with non-endowed fund
- The Foundation provides:
  - Family name remembrance with grants
  - Protection of intent
  - Variance power for the donor
- Eligible for QCD from retirement assets

Donor Advised Funds

- High tech/high touch
  - Fully online infrastructure
  - Personal connection in areas of interest for your clients
- Ability to accept complex assets (cryptocurrency, real estate, etc.)
- Investment options & possibility to stay with current investment manager

Institutional & Purpose-Driven Funds

Provide support for an institution or area of work

Donations from the public are encouraged

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

catholiccf.org/funds

2 Legacy Planning Services

"Single beneficiary" strategy

Donors name the Foundation as their single charitable beneficiary and we distribute the gift according to their wishes- creating or contributing to funds or facilitating dontations directly to organizations

Legacy gifts made to DAFs for the next generation

Donors can set up or add to existing Donor Advised Funds to fuel philanthropy in the next generation

Can create endowed or non-endowed funds

catholiccf.org/give-later

3 When Should I Call the Foundation?

Your client wants...

- to include a charitable intent in their estate plan but doesn't know where to start
- innovative ideas for combining multiple types of giving vehicles and/or beneficiaries
- a Donor Advised Fund with a high-touch, personalized *and* high-tech, paperless experience
- a partner to be the guardian of their charitable wishes after their lifetime

catholiccf.org/professional-advisors