

Your
Philanthropy
Partner



COMMUNITY FOUNDATION OF BROWARD

For Good. For Ever.

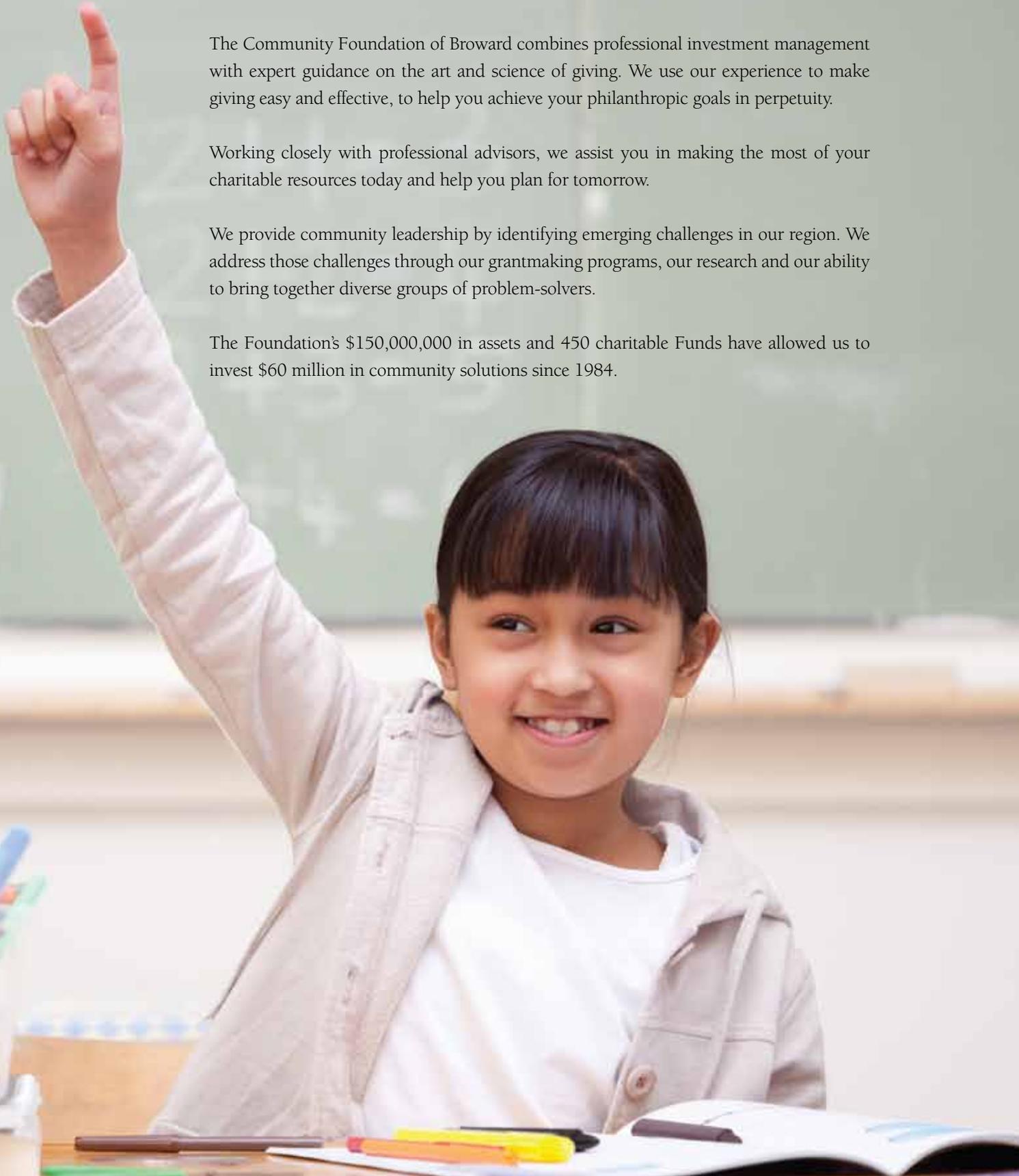
Who we are

The Community Foundation of Broward combines professional investment management with expert guidance on the art and science of giving. We use our experience to make giving easy and effective, to help you achieve your philanthropic goals in perpetuity.

Working closely with professional advisors, we assist you in making the most of your charitable resources today and help you plan for tomorrow.

We provide community leadership by identifying emerging challenges in our region. We address those challenges through our grantmaking programs, our research and our ability to bring together diverse groups of problem-solvers.

The Foundation's \$150,000,000 in assets and 450 charitable Funds have allowed us to invest \$60 million in community solutions since 1984.



Do you want to fight poverty? Offer children a brighter future? Champion the arts? Broad or narrow, you can support your interests through a Fund at the Community Foundation of Broward.

What we do

Make it personal We help you explore what your philanthropy can achieve through thoughtful questions and exercises that engage you and those you care about. We create a Fund and philanthropy plan that meets your needs, and is meaningful to **you**.

Create something in your name A Fund carries your name or the name of someone important to you. Your Fund will continue to support efforts that promote the difference you want to see in the world.

Inform your choices We know this community and the nonprofits within it. We vet organizations, monitor their progress and update you through publications, events and workshops.

Make it fun We take care of complex, and ever-changing legal, accounting, tax and compliance issues, so you can experience the simple joy of giving.

Maximize tax benefits Your gift to create a Fund at the Foundation earns you the maximum tax benefits allowed by law.



Our Mission

To provide leadership on community solutions, and foster philanthropy that connects people who care with causes that matter.

Starting is easy

Share your thoughts on what you would like your philanthropy to accomplish so we can craft the right Fund for you.

Select a name for your Fund. Most Funds are named for the donor, the donor's family, or to honor someone special. If you prefer anonymity, we can help you select an appropriate name for your Fund.

Choose the assets you would like to use to create your Fund. Cash, publicly traded securities, closely held stock, interests in limited partnerships, real estate or tangible personal property are often used.

When To Begin

While anytime is a good time, consider the value of a Fund when:

- A financial event occurs and you are about to receive new assets
- It is tax-wise to make a gift before year-end
- You update your will or trust
- You are thinking about a private foundation

A Fund performs much like your own private foundation, but without any of the legal or administrative burdens. It can be created in a matter of hours at no start-up cost to you, compared to the months and financial expense required to create a private foundation.

1

**Name and Create
Your Fund**

Our team works with you to create a Fund that reflects your unique wishes.

2

**Seed
Your Fund**

Make a gift to seed your Fund. We accept a wide variety of assets and invest them in a prudently managed investment pool. You can also direct a gift from your will or trust to create or add to a Fund.

3

**Make Grants
from Your Fund**



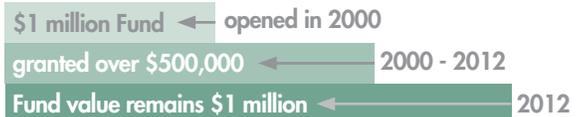
Grants can now be made from your Fund. We will help you make a difference on issues and causes that matter to you.

Make a difference



When you open a Fund at the Foundation you can make an enduring difference that bears your name, represents your values and lives on through generations. Take **Everett Metcalf**, who created a Fund in 2000. His

Fund helps young people in foster care and supports good nutrition and physical activity programs for children.



To learn more about the Foundation and how to start a Fund please scan here.



Philanthropy set free



Philanthropy Network for Broward is an online portal created exclusively for our donor advised* Fundholders.

PhilNet gives you instant access to your Fund and giving history. It also enables you to read about outstanding local projects. Best of all, you can use PhilNet to submit grant recommendations securely... anytime, anywhere.

*While there are many Fund types to meet your needs, donor advised Funds are the most flexible and popular. They allow your Fund to perform like your own private foundation...with even greater benefits.

Where Make an impact close to home or anywhere in the world. We will ensure each organization is in compliance with IRS requirements, complete all due diligence and deliver your support quickly and effectively.

How Tell us what you wish to support and how much you want to give and we take care of the rest. It is that simple. If inspiration strikes you at home or while traveling you can make these recommendations day or night online via PhilNet at cfbroward.org. You can also fax or email a recommendation form to us.

What You want to know what difference you have made. Let us tell you. Learn how your grants change lives through reports from the organizations, stories and site visits where you can see your grants in action.

Anonymity – You can choose to give any or all of your grants anonymously from your Fund.



Perhaps you need your assets during your lifetime and are not ready to start a Fund today. Consider creating a legacy through a gift from your will or trust. The Fund you start tomorrow can fulfill your wishes and make a tremendous impact on causes that matter to you.

Plan a gift

1. Talk to your attorney about designating a percentage, dollar amount or the remainder of your estate to the Community Foundation of Broward to create a charitable Fund.

2. Meet with us so we can capture what you want your Fund to accomplish.

3. Revisit and change your plans from time to time, so they always reflect you.

Retirement assets, insurance plans and tangible items can also be used to create your Fund tomorrow. Consult your legal or financial advisors for assistance. And remember that you can use assets from your estate to add to an existing Fund, increasing its capacity to help.

The plan you begin today will make a difference to the organizations you care about...*For Good. For Ever.*

Contact us at the
Community Foundation of Broward for more
information about how you can begin your
philanthropic journey. Call 954.761.9503
or visit us online at cfbroward.org

We gratefully acknowledge our friends at Colonial Consulting, LLC, who made this publication possible.

 COLONIAL
CONSULTING LLC

Start today

To begin a personal conversation about how you can
begin your philanthropic journey, call 954.761.9503
or visit us online at cfbroward.org



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We were the first community foundation in Florida and remain among an elite group of community foundations nationwide to be confirmed in compliance with the National Standards for U.S. Community Foundations.

