

Your Private Foundation Alternative

Why take months to create a private foundation only to be burdened with tremendous administrative, financial and regulatory duties? In a matter of hours, you can begin to support causes you care about through a Community Foundation of Broward Fund. Enjoy the benefits of a private foundation, with the added advantages of greater tax benefits, more flexibility and the year-round support of expert philanthropic advisors. Compare your options:

		Community Foundation of Broward	Private Foundation
SERVICES	Mission Development	Included	Fee-based*
	Grantmaking Support	Included	Fee-based*
	Diversified Portfolio	Included	Fee-based*
	General Administration	Included	Fee-based*
	Peer Networking	Included	N/A
	Philanthropy Education	Included	Fee-based*
	Online Services	Included	Fee-based*
SET-UP CONDITIONS	Cost	None	Fee-based*
	Time-Frame	Immediate	Several months
INCOME TAX DEDUCTIONS	Cash	60% of AGI <small>(Adjusted Gross Income)</small>	30% of AGI
	Publicly Traded Securities	30% of AGI	20% of AGI
	Closely Held Stock or Real Estate	30% of AGI	20% of AGI**
	Available Carry-over	Yes	Yes
TAX CONSIDERATIONS	Tax Returns and Audits	Included	Fee-Based
	Excise Tax	None	Varies
ADMINISTRATION	Minimum Payout	None	5% annually
	Management and Investment Fees	Competitive	Competitive
ONGOING REQUIREMENTS	Liability and Insurance	Included	Purchased
	Accounting	Included	Fee-based*
	Record-Keeping	Included	Fee-based*
	Due Diligence/Grant Monitoring	Included	Fee-based*

*Professionals such as attorneys and accountants charge varying fees for these services.

**Limited to cost basis.

Our Promise to You

The Community Foundation of Broward delivers the personalized and efficient service you demand. We invite you for a conversation about how we can help you make a bold impact on the causes you care about.

For more information, contact Vice President of Philanthropic Services Nancy Thies at nthies@cfbroward.org or 954-761-9503

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BE BOLD



COMMUNITY
FOUNDATION
OF BROWARD

453 Charitable Funds • \$197 Million in Assets • 34 Years of Experience • \$100 Million in Community Grants • Rated in Top 100 Community Foundations