About the Community Foundation of Sarasota County

Since our founding by the Southwest Florida Estate Planning Council in 1979, the Community Foundation of Sarasota County has been making the important connection between individuals’ personal memories, passions and dreams, and the fulfillment of their charitable goals.

We help create permanent charitable funds with consideration given to philanthropic investment results and have everlasting community impact. These funds ensure that people of vision have an enduring influence on our community and the charitable causes they hold dear.

Our philosophy is to actively listen to the desires and needs of our donors and have to ask the right questions. Each donor’s philanthropic legacy is strategically planned to meet their desired charitable investment returns and impact.

With assets of $400 million in more than 1,500 charitable funds, the Community Foundation of Sarasota County has the expertise and ability to award millions of dollars in grants and scholarships each year. Since our founding, more than $252 million has been invested back into the communities we serve throughout the region in the areas of education, health and human services, the arts, animal welfare and the environment.

Be The One
Our Impact

One donor at a time, we pride ourselves on our ability to carefully listen to your charitable investment goals and opportunities to achieve lasting impact in the community. As your partner in charitable giving, the Community Foundation of Sarasota County is guided by:

**Stewardship**

Providing quality service is our number one priority. We oversee funds in perpetuity, ensuring they are managed exactly as intended. The Community Foundation’s assets are invested by some of the nation’s most outstanding financial management firms. Investments are overseen by a separate volunteer committee, chosen for their experience in financial management, and maintained by an experienced staff.

**Collaboration and Connections**

Together, we identify ways the Community Foundation can enhance the impact of individual, family and group philanthropy through grant investment opportunities. We arrange personalized and insightful site visits to potential nonprofit organizations you may wish to support.

**Community Solutions**

We connect donors with like-minded people, nonprofit organizations, government entities and education institutions to find and develop effective solutions across our region, all while staying alert to emerging issues and opportunities. Through a national network of community foundations, we can advise donors about charities all over the country, and can grant to any qualified public, nonprofit charitable organization located in the United States. We stay on top of best practices so that donors can enjoy peace of mind. We also offer knowledge and updates on community issues and needs.

**Research + Knowledge**

For donors who would like to support a particular nonprofit organization or cause, we can provide in-depth information about particular organizations. Our online tool, The Giving Partner, provides detailed financial, governance, and programmatic information about more than 800 local nonprofits in our area.
Expertise and Services

Working with the Community Foundation of Sarasota County adds a powerful philanthropic partner to your team of professional advisors. We offer a highly personal and results-oriented approach to philanthropy to enhance community impact.

The Community Foundation of Sarasota County is a key partner in any wealth team.

With each donor, the Community Foundation of Sarasota County works to achieve everlasting charitable impact through creative solutions. Your intent to transform your dreams, values, and motivations to advance our community is what we seek to ensure to you, that philanthropy continues to make an impact for those you most want to help.
Trust

For 40 years, the Community Foundation of Sarasota County has offered a stable, protected environment for charitable funds to ensure philanthropic legacies continue to grow for generations to come. We are proud that numerous local professional advisors have longstanding partnerships with our Community Foundation. We are deeply rooted in the region and consider it a privilege to work with many well-respected experts and community leaders.

We develop a strategic philanthropic investment plan with a results-based philosophy. Donors driven to achieve results, especially with charitable legacy planning, will want to be intentional in the decisions they make about how to be effective philanthropic investors.

Individually Managed Accounts

One way a financial advisor can help his or her clients achieve their charitable goals is through a fund at the Community Foundation of Sarasota County. Funds with balances over $250,000 can continue to be overseen by the donor’s financial advisor, providing customized investment management, working in partnership with us.

DONOR
Makes a tax-deductible contribution into his or her fund at CFSC and makes grant recommendations

CHARITABLE FUND AT CFSC

ADVISOR
Provides investment management services

GRANTS
To any 501(c)(3) public charity, including churches, synagogues, and schools
Charitable Fund Types

Whether you want to make a one-time donation, or establish a permanent charitable legacy, our team will help develop a customized philanthropic plan that benefits a donor’s family, as well as your favorite nonprofit organizations and intended beneficiaries, and ultimately, impacts the community at large. The Community Foundation of Sarasota County offers an array of different fund types to match a donor’s philanthropic goals.

Donor Advised Fund
A personal charitable account into which donors make tax-deductible contributions. This fund is our most flexible fund which permits donors to make grant recommendations to any 501(c)(3) public charity located in the United States. With no administrative burdens and no cost to established, it is a good alternative to a private foundation.

Designated Fund
This fund supports one or more specific nonprofit organizations the donor selects. A designated fund ensures continuous gifts to a donor’s preferred charitable organizations, perpetuating their charitable impact.

Field of Interest Fund
This fund allows donors to support broad areas of interest, such as education, the arts, the environment, or youth services. The Community Foundation evaluates and makes grants to nonprofits making significant impact in the area of interest.

Scholarship Fund
This fund helps traditional students and adult learners pursue their academic goals and can be established by companies, organizations, families, or individuals.

Unrestricted Fund
This fund offers the greatest flexibility in responding to the community’s changing needs and allows the Community Foundation to address issues as they emerge. By creating unrestricted funds, donors create a legacy that will grow and change as their community does.
Plan Your Charitable Giving

These are just a few questions to consider as you form your charitable investment plan.

What is Your Passion?

- What motivates you to give? What inspires or concerns you?
- Do you wish to evaluate the effectiveness of your grant-making?
- Whom do you intend to benefit?
- What results do you want your charitable investment dollars to achieve?

How Will You Give?

- What is your vision or long-term goal for your charitable investment?
- What type of assets will you give to fund your giving?
  (e.g. cash, stock, real property)
- Are you looking for a tax deduction to offset a large income gain?
- Do you wish to obtain income from your philanthropic gift?
  - Do you want your spouse and children to benefit from your gift first and then the remaining amount go to charity?
  - Do you wish to benefit the charity for a term of years and the remaining amount go to your children?

What Next?

The Community Foundation of Sarasota County is here to help you learn about the community to discover organizations doing work in your areas of interest. We can help arrange site visits, provide background information on nonprofit organizations, or identify experts connected with your area of interest. Our knowledgeable staff can also work with your team of professional advisors to ensure your giving achieves the greatest impact by formulating a philanthropic investment plan with a results-based philosophy. Please contact our leadership team to establish your philanthropic legacy. (See back)
Our Team

The flexibility of the Community Foundation ensures a personalized philanthropic plan. Whatever your charitable wish—to house the homeless, support education or the arts, clean up a neighborhood park, or participate in a broad revitalization initiative—we can be your preferred partner.

Roxie Jerde
President and CEO
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Since arriving in Sarasota, Roxie has worked closely with Community Foundation donors, along with area nonprofits, businesses and foundations, to solve important issues affecting our community. She spearheaded the launch of The Giving Partner in partnership with seven successful Giving Challenges that have raised more than $58 million for local nonprofits. She has been a leader in numerous community collaborations.

Marlo Turner, CFRE
Senior Vice President, Philanthropy
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It is Marlo’s duty and passion to work with donors, connecting them with the causes they care about to ensure their philanthropic goals.

Before joining the Community Foundation family, Marlo was the Director of Development for the Philbrook Museum of Art, Tulsa, Oklahoma. She has more than 20 years of experience in the development field for health care, museums and prestigious education institutions, such as Oklahoma State University Foundation and the Jenks Public Schools Foundation.

Betsy Pennewill, J.D.
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Betsy works with donors driven to achieve results, especially with charitable legacy planning and creating a results-focused philanthropic investment plan. Betsy earned her law degree magna cum laude from Stetson University College of Law in 1998. She began her practice with a large law firm in Tampa with a focus on real estate transactions and corporate lending matters before transitioning into an estate planning practice where she worked with clients to fulfill their wealth transfer plans.