

**Be The One**



## A RESOURCE FOR CHARITABLE GIVING

COMMUNITY IMPACT POWERED BY PHILANTHROPY



### CONTACT US

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## 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 everlasting 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 to ask the right questions. Each donor's philanthropic legacy is strategically planned to meet their desired charitable impact.

With assets of \$400 million in more than 1,400 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.

How do you want to help?

## Be The One



# Our Impact

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One donor at a time, we pride ourselves on our ability to carefully listen to your 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

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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

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

## Community Solutions

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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

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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 700 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 impact-orientated approach to philanthropy.

## Investments

Financial Advisors and  
Trust Officers

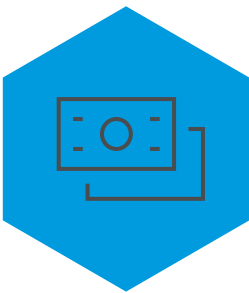


## Estate Planning

Attorneys and Wealth  
Advisors

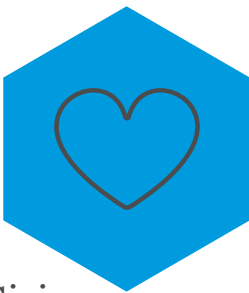


The Community Foundation of Sarasota County  
is a key partner in any wealth team.



## Taxes

Certified Public Accountants



## Charitable Giving

Community Foundation of  
Sarasota County

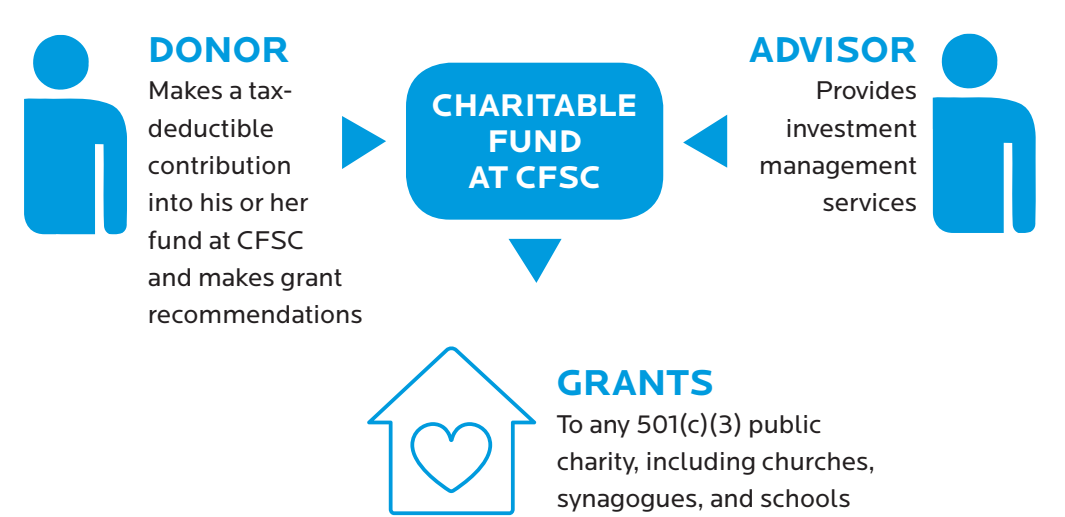
With each donor, the Community Foundation of Sarasota County works to achieve everlasting charitable impact through creative solutions.

# Trust

For 40 years, the Community Foundation of Sarasota County has offered a stable, protected environment for charitable funds so that philanthropic legacies continue 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.

## 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 \$100,000 can continue to be overseen by the donor's financial advisor, providing customized investment management, working in partnership with us.



# 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 organizations, and ultimately, the community. The Community Foundation of Sarasota County offers an array of different fund types in order to match a donor’s philanthropic goals.

## Donor Advised Fund

A personal charitable account into which donors make tax-deductible contributions. Donor-Advised funds permit donors to participate in the distribution process by recommending grants to qualified 501(c)(3) organizations.

## 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.

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# Plan Your Charitable Giving

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

## What is Your Passion?

- ☐ What motivates you to give? What inspires or concerns you?
  - ☐ What are your core values or principles?
  - ☐ Who in your life strongly influenced you, and how did those formative life experiences shape your view of the world?
  - ☐ What issues do you want to affect and how?
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## How Will You Give?

- ☐ What is your vision or long-term goal for your giving?
  - ☐ 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?
    - a. Do you want your spouse and children to benefit from your gift first and then the remaining amount go to charity?
    - b. Do you wish to benefit the charity for a term of years and the remaining amount go to your children?
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## 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 expert staff can also work with your team of professional advisors to ensure your giving achieves the greatest impact. Contact our leadership team to establish your philanthropic legacy.