



INSPIRING AND
CONNECTING
Thoughtful Giving



Toledo
Community
Foundation

Our purpose.

Since 1973, area residents have been turning to the Toledo Community Foundation to make their philanthropic giving as effective as possible. We are a public charity serving thousands of people who share a common concern—improving the quality of life in northwest Ohio and southeast Michigan.

Individuals, families, businesses and organizations create permanent charitable funds that help our community meet the challenges of changing times. The Foundation invests and administers these funds. We then use the investment earnings to award grants each year to many of the humanitarian, educational and cultural nonprofit organizations in our community, leaving the principal intact in perpetuity. In this way, we are building a permanent endowment to support community needs.

The Foundation connects you and your inspirations to achieve your philanthropic goals for the betterment of this community we call home.

Like all community foundations, we go beyond simply making grants that advance charitable activities. We also identify current and emerging issues, stimulate resources to address those needs and help our community prepare for the future.

How can I invest in the future?

You've worked hard to achieve your goals and to support the causes and institutions you believe in. Charitable giving is an important part of your life. As someone who knows the value of giving, you want to be assured that your gifts will meet vital needs and improve your community.

You want to know your gifts will achieve positive results and, of course, maximize your tax deductions. You may want to involve your family in your giving. You want a tasteful level of recognition—or perhaps you want anonymity.

But most of all, you want an easy and flexible way to accomplish your objectives.

There is a simple way for you to make a connection and leave a lasting legacy in our community. You can make a connection for good, a connection forever—and that's by establishing a fund with us.

How does it work?

The community foundation idea is simple: Anyone may use it to give something back to the community.

Assets that you donate to the foundation create one of several types of funds to support your charitable goals. We offer you a full menu of planned giving options to tailor your gift.

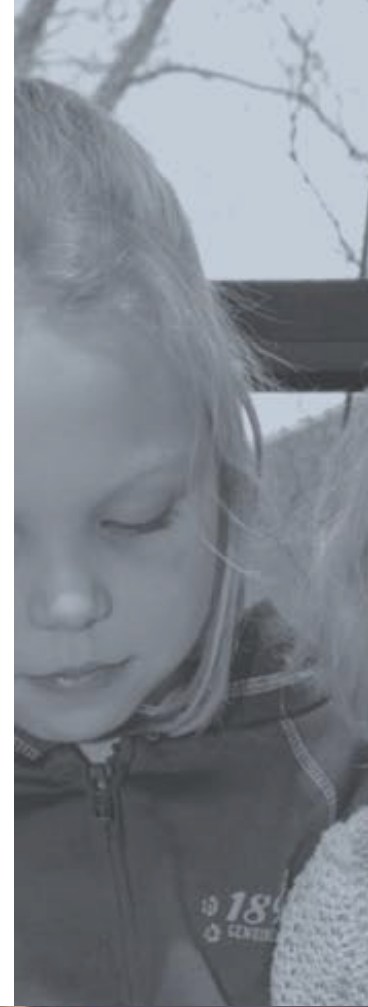
You can create a fund in honor of someone you love or to celebrate a special event. You can direct your gift broadly or narrowly to issues you care about or to wherever the needs are greatest. However you give, your gift can change lives—today and in the future.

We use professionals to invest and manage our assets. Our Board of Trustees are local citizens who know the community. And our staff helps you create the gift that inspires your philanthropic spirit.

We offer you power and flexibility in charitable giving without the paper work, time and expenses associated with running your own private foundation. We can help you set up a fund that will maximize both your tax advantages and your impact in the community—now and forever.

Here are some ways we can help you:

- Manage your fund and oversee its investment and maintain tax records.
- File tax returns and provide an independent audit.
- Provide services of experienced grant makers who know the community, its needs and its organizations.
- Ensure that grants are always awarded in the name of your fund.
- Issue regular financial reports detailing the status of your fund.



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How do I create a fund?

1. Decide when to give.

You can create your fund now, establish it in your will, or create it through a trust arrangement that benefits your family as well as charity. You may give in honor of an anniversary, to celebrate a special event or to support a cause. Tax deductions are earned at the time of your gift, while grants awarded from your fund will continue into the future.

2. Decide what to give.

Almost any kind of asset can be used to start your fund, such as cash, publicly traded securities, closely-held stock, interests in limited partnerships, life insurance policies, retirement fund accounts, real estate, tangible personal property and private foundation assets.

We can also discuss other options with you, such as bequests, charitable remainder trusts and charitable lead trusts.

3. Choose the name for your fund.

Most of our funds are named for the donor or the donor's family or as a memorial to someone special. Every grant from the fund will carry this name. If you prefer anonymity, you may choose a name that reflects your fund's charitable purposes.

4. Choose a type of fund.

We offer a variety of funds that are flexible to meet our donors' different charitable interests.

Community Funds offer the broadest giving option, allowing grants to be made wherever our professional staff determines our community's needs are the greatest.

Donor Advised Funds enable you to recommend specific organizations or a general area of interest.

Single Advised Fund allows only you to make grant recommendations.

Family Advised Fund provides a simple and popular way for your family to engage in organized philanthropy.

Corporate Advised Fund offers flexible options for businesses' and corporations' (and/or their employees') charitable giving programs. Your company or business can outsource all—or any part—of its charitable giving program to the Foundation for management.

You can endow your fund, requiring that the principal of the fund remains untouched and only a percentage of the annual earnings on the fund are available for grant making; or you can create a growth fund (non-endowed) allowing the flexibility to distribute both fund principal and annual earnings, although not below the minimum required fund balance of \$10,000.

Field of Interest Funds allow you to fund specific areas such as the environment, youth, arts or a geographic area that you feel strongly about but you are not restricted to any one particular organization.

Designated Funds let you support one or more specific charitable organizations while we make sure that grants to these groups remain relevant over time and responsive to changing circumstances.

Scholarship Funds help students pursue academic goals. You may define guidelines for candidacy, the advisory committee, the school and the award itself.

Supporting Organizations are separate grant making entities. With the Foundation, you establish a board of trustees to make grants in your interests. A Supporting Organization's alliance with the Foundation reduces administrative, investment and regulatory burdens.

Donor Directed Pooled Funds allow you the privilege of designating specific charitable organizations to receive grants from your fund.

Organization Endowment Funds are established by nonprofit organizations to provide income for their operations, programming or other organizational needs. We handle all administrative and investment responsibilities, freeing the organization to pursue its charitable mission.



Four steps to easy philanthropy.

1. Discuss your overall philanthropic goals with your family members and legal or tax advisors. Decide how much you can afford to give. Determine the causes/organizations that will use your donations to meet the goals you support.
2. Meet with us to discuss your plan. Ask questions, explore the different gift vehicles available to you and review the documents needed to implement your plan.
3. Determine which asset you will use to start your fund, and the type of fund you'd like to create.
4. Select a name for your fund.

Why choose us?

We know your community.

When you choose to invest in the future of our community, you want to work with someone who knows the territory. The broad cross-section of leaders who guide our work lends valuable insight that will help your charitable giving achieve maximum results.

We help you achieve superior tax benefits.

Since the IRS considers us a public charity, contributions are eligible for the highest available tax deductions. In most cases, these tax benefits outweigh using your assets to establish your own private foundation.

We make set-up and administration easy.

Establishing a fund can be done in less time than it takes to open a bank account. We take care of all the administrative and grant making activities, eliminating the need for you to set up a separate institution, formulate policies, file innumerable forms and monitor the status of grant recipients. We save you precious time and money.

We share your interests.

We are here to help you become connected to the issues you care about most. Your charitable interests and priorities are important to us because committed, caring citizens are so important to our community's well-being.

We care about the future.

By setting up a fund, you have the ideal opportunity to create a legacy for yourself and for our community.

Go ahead. Get inspired.

By establishing a fund with us, you'll know your gifts are in good hands. Our staff can help you identify where your gifts will best benefit the community.

The result is a lasting legacy that addresses the needs of today and the challenges of tomorrow, establishes a tradition of philanthropy and ensures that your fund will develop community capital to improve the quality of life now and well into the future.

We are your premier local source for comprehensive charitable gift planning.

What do I do now?

Contact us. You may know precisely which organizations you want to support or you may not. In either case, we can help you shape a grant making program that fits your needs and carries out your charitable intent forever.

Let us show you just how easy, flexible and effective your charitable giving can be.

And how you can make a difference by giving something back to the community that helped you get where you are today.

Please contact your Foundation at 419.241.5049 or email toledocf@toledocf.org.



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