

CENTER FOR
Individual & Family
Philanthropy



Toledo
Community
Foundation

Inspiring philanthropy.

To help you achieve your personal charitable giving goals, the Toledo Community Foundation offers a broad range of services through the Center for Individual & Family Philanthropy.

The Center provides philanthropic support to individuals, couples or entire families.

We work with you to create funds that will make your giving generate the greatest possible impact while fulfilling your philanthropic mission. We share your commitment to building healthy communities and promoting responsible stewardship of resources.

Whether you choose to open a fund that has an immediate impact on the community, a permanent endowment to address ongoing needs or a legacy for your community, the Center can help make your gift giving easy and effective.

How do I decide what I want to support?

Whether you are making a small initial contribution or a million dollar gift, new to philanthropy or experienced in charitable giving, we work with you to create an individualized giving plan to determine the values that will guide your giving.

The Center's staff talks with you to find out what interests you. You might like to support the environment, the arts, education, human services or many other worthwhile endeavors in the community.

For you, our staff:

- Explores and identifies the most appropriate philanthropic vehicle to meet your needs.
- Develops a plan tailored to your interests and giving priorities.
- Structures goals to help you reach your giving vision.

What do I get for my gift?

Through your generosity, you can make a meaningful connection to the community.

You can:

- Name your fund for you, your family, to honor a loved one or remain anonymous.
- Provide current and/or permanent support for your favorite charities.
- Receive prompt gift acknowledgment and grant processing.
- Obtain timely grant research and due diligence.
- Access your fund online to check the fund balance and make grant requests.
- Receive annual gift planning and/or fund management consultation.
- Make targeted site visits to charities.
- Work with a dedicated staff member.
- Take advantage of research on topics of interest.
- Receive a comprehensive review of your giving and grant strategies.
- Attend special networking events with other Foundation supporters.

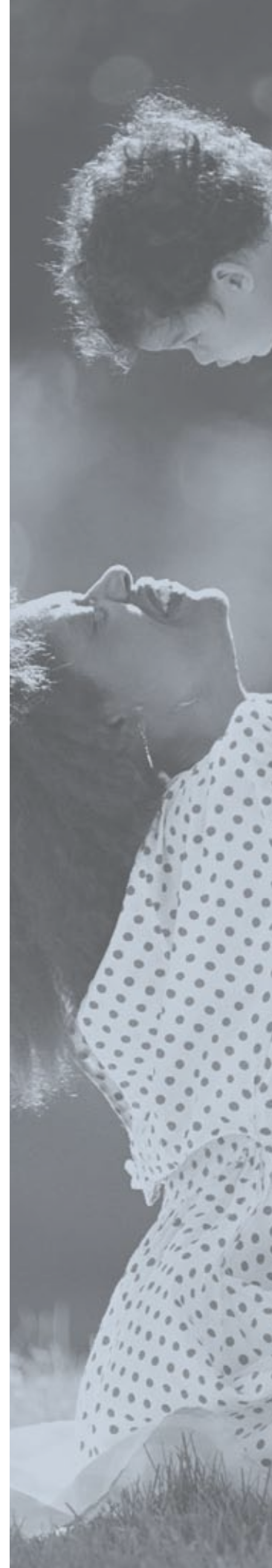
What about the paper work?

The Foundation handles all grant making paper work. We make sure that every nonprofit organization you support is qualified as a charitable recipient.

We send out your grant checks and provide you with regular reports on grant activity and history of your fund.

For you, our staff:

- Plans, facilitates and documents committee or board meetings.
- Manages grant making commitments.
- Promotes your philanthropic objectives to appropriate causes.
- Develops a plan for succession to your next generation.





What can be donated?

You can make donations in a number of ways. Gifts can be made during your lifetime or through a planned gift.

Cash gives you a tax deduction as provided by current law.

Publicly traded securities avoid capital gains tax and allow the maximum tax deduction for the full fair market value. You can also donate **closely-held stock** and **limited partnership interests**.

Bequests in your will are a simple way to leave a lasting legacy.

Life insurance policies can be changed to designate the Foundation as the owner and/or beneficiary of policies.

Retirement fund accounts can be given both during your lifetime and upon your death.

Real estate can be deducted at full fair market value, up to 30 percent of your adjusted gross income. You can also donate **tangible personal property**.

Charitable remainder trusts allow you or other named beneficiaries to receive lifetime income. Upon your death, the remaining principal creates a fund at the Foundation. You receive an immediate charitable deduction for a portion of the gift and avoid capital gains tax.

Charitable lead trusts create income for the Foundation for a specified period, after which the remaining principal is distributed to named beneficiaries. Gift and estate taxes are reduced with this gift.

Transfer of a private foundation affords you many advantages, most notably a sizeable tax deduction.

How secure is my gift?

Your gift is invested for continued growth, allowing it and the community impact to grow. The members of our Board of Trustees are respected civic and business leaders. The trustees direct your assets to sound financial investments that help your fund grow and meet the needs of the community.



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What does the Foundation offer?

We like to become your partner to increase your generosity and help the community meet its most pressing needs.

You have the opportunity to review funding proposals prescreened by our staff and help make decisions on awarding grants.

Or you can pool your funds with other philanthropists to work on a common cause or support the same organizations.

As the largest broad based funder in the community, the Foundation responds quickly to natural disasters or local emergencies and invites you to join in supporting the community when unanticipated needs arise.

For you, our grant making experts:

- Facilitate grant making requests and field grant making inquiries.
- Prepare and present critical needs reports, solicit proposals and serve as a liaison between you and potential grant recipients.
- Research, evaluate and recommend potential grant recipients, monitor the use of your funds with the grant recipients, and review and report grant recipient effectiveness to committees or trustees.
- Offer philanthropy workshops for you or your family to achieve your charitable mission.
- Organize nonprofit organization site visits to promote participation in your fund.

What kind of funds are available?

There are many ways to support your interests. Do you want to give to a specific organization or a specific area of interest? Launch a scholarship to honor or memorialize a loved one? Restrict your giving to northwest Ohio or fund internationally?

A fund at the Foundation operates like a private foundation without the administrative and legal burdens associated with private foundations. You decide on the degree of involvement that is comfortable for you.

Community Fund

A Community Fund is the broadest option and leaves the decisions about your gift to the Foundation. You trust the Foundation to identify the most pressing needs in the community. The fund provides maximum assurance your gift will remain timely and relevant.

Donor Advised Fund

You take a more active role in the grant making. This fund provides maximum flexibility for your grant making and allows designated advisors named by you to make recommendations regarding grants. The Foundation handles all the financial, legal and tax requirements and develops grant making strategies and conducts due diligence on prospective charities.

Single Advised Fund allows only you to make grant recommendations.

Family Advised Fund provides a simple way for your family to participate in organized philanthropy.

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 Fund

You 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 Fund

You select one or more specific organizations you want to fund in perpetuity.

Scholarship Fund

You establish an educational scholarship for a specific interest, level of education or geographic area.

Supporting Organization

You create a separate and distinct legal and grant making organization that is in direct affiliation with the Foundation.

Donor Directed Pooled Fund

You have the privilege of designating specific charitable organizations to receive grants from your fund.

How do I get started?

It's easy. Just contact your Foundation at 419.241.5049 or email toledocf@toledocf.org.



**Toledo
Community
Foundation**

Inspiring and Connecting Thoughtful Giving

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