



FUND OVERVIEW

Designated Fund

Establishing a designated fund with Branch County Community Foundation allows you to support the good work of your most valued nonprofit organization long-term. For the nonprofit, the fund creates a permanent income stream from which they can take annual distributions to support their mission or preserve the available dollars for a large expense in the future.

Because it's given through the community foundation, your gift provides the nonprofit not only funding but also planned giving support and investment management services.

HOW IT WORKS



GIVE TO YOUR FUND



INVEST FOR GROWTH



GRANTS TO NONPROFITS

- You identify an organization that you wish to support through your fund.
- You make a gift to the community foundation—you can give cash, appreciated stocks, real estate or other assets.
- We set up a special fund in your name or in the name of the nonprofit organization you choose.
- You may receive tax benefits in the year your gift is made.
- Our board issues grants to the designated nonprofit organization at their request.



A SOURCE OF STRENGTH AND STABILITY

Three times a week, Wendell Pittman delivers meals to senior citizens as a volunteer for Meals for Seniors. While the organization has benefited from volunteerism and community recognition for over a decade, it depended largely on small donations and lacked a more predictable funding source. “Our organization needed more reliable funding, but we had trouble accepting large or complex gifts,” Mary Lynch, executive director, Meals for Seniors said. After talking with Mary and with his financial advisor, Wendell decided to establish a designated fund with his local community foundation. He donated a piece of rental property. The community foundation immediately sold the property and established the Meals for Seniors Fund. Thanks to this fund other donors can contribute assets of a variety of types and sizes. “We’re thrilled to be working with our community foundation,” Mary said. “Meals for Seniors would not have been able to do this on its own.”

10 REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION

- 1 We are a **local organization** with deep roots in the community.
- 2 We have **broad expertise** regarding community issues and needs.
- 3 We provide highly **personalized service** tailored to each individual's charitable and financial interests.
- 4 Our funds help people **invest in the causes** they care about most.
- 5 We accept a wide **variety of assets** and can facilitate even the most complex forms of giving.
- 6 We partner with **professional advisors** to create highly effective approaches to charitable giving.
- 7 We offer maximum **tax advantages** for most gifts under state and federal law.
- 8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants.
- 9 We build **endowment funds** that benefit the community for decades and help create personal legacies.
- 10 We are a **community leader**, coordinating collaborative resources to create positive change.

FUND OVERVIEW DESIGNATED FUND

- We handle all the administrative details, including managing specific qualifications that you may establish for grant disbursements.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

OTHER ADVANTAGES

A designated fund provides an excellent way to give back to an organization that has touched your life. Your gift provides more than just funding—your favorite organization will benefit from the community foundation's investment stewardship and ability to manage endowment funds.

Because the community foundation handles the details, the nonprofit organization's staff is free to focus on its mission. The community foundation can facilitate even the most complex forms of giving, such as planned gifts, gifts of appreciated stock or real estate.

You can add to the fund at any time. If the organization you select ceases to exist or changes in mission, the fund can be redirected so that it continues to address your charitable intent.

LET'S CONNECT

Contact us to learn more about the ways we can help you have a positive impact on the community and causes you care about.



Branch County Community Foundation

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