

# Why partner with us.



## YOUR PHILANTHROPY EXPERIENCE

When you open a Fund at the Community Foundation of Broward, you instantly gain a team of experts who will maximize the impact of your giving and ensure it is a joyful, rewarding and worry-free experience. Your Foundation team will provide expert philanthropic counsel and handle all the legal compliance, administration, and monitoring you expect from a nationally recognized, full-service foundation. We call this “your philanthropy experience.” When you decide to create your own personalized charitable Fund, this is what you can expect on your journey to game-changing philanthropic impact.

### VALUES 360° EXPERIENCE

- ◆ Facilitated discussion about your values and interests – your life stories.
- ◆ Development of your Philanthropic Mission Statement.
- ◆ Documentation of your values, interests and mission to chart your philanthropic journey.

### PHILANTHROPY PLANNING

- ◆ Create your philanthropy plan based on your Values 360° experience.
- ◆ Structure your philanthropy plan so that it is strategic and reflects who you are.

### SIGN THE FUND AGREEMENT

- ◆ Name your Fund – create your legacy.
- ◆ Define the purpose of your Fund – reflective of your values and interests.
- ◆ Create the right Fund type structured to meet your needs.

### WELCOME & ORIENTATION

- ◆ Receive your philanthropy playbook with all your pertinent Fund information.
- ◆ Enjoy a rundown of our calendar and its social and educational opportunities.

### GRANTMAKING BASED ON YOUR PHILANTHROPY PLAN

- ◆ Due diligence of nonprofit programs.
- ◆ Error-free and timely processing of grants.
- ◆ Know you are making an impact through reports and success stories.
- ◆ Comprehensive quarterly financial statements of all Fund activities.

### PEACE OF MIND

- ◆ Your Fund has access to our sophisticated investment portfolio with world-class oversight.
- ◆ Constant compliance with ever-changing IRS regulations and best practices.
- ◆ Experience the joy of giving, knowing we handle administrative details.
- ◆ Receive community updates: annual report, newsletters and special community reports.

### EDUCATIONAL OPPORTUNITIES AND SPECIAL INVITATIONS

- ◆ Learn about causes and organizations through organized site visits.
- ◆ Join like-minded philanthropists and community leaders at Food for Thought experiences – fun and educational events.

### ANNUAL EVALUATION OF YOUR PHILANTHROPY EXPERIENCE

- ◆ Sit down with your Community Foundation team to ensure your philanthropy continues to be joyful, fun and reflective of your values.

### COMMUNITY BUILDER PLANNING

*for endowed Funds seeded with a minimum of \$1 million*

- ◆ Memorialize your legacy among leading philanthropists on our beautiful donor wall.
- ◆ Celebrate your philanthropy at a private reception.
- ◆ Inspire others with a Community Builder announcement card.

# Who we are.

The Community Foundation of Broward helps families, individuals, and corporations create personalized charitable Funds that deliver game-changing philanthropic impact.

A Fund performs much like your own private foundation, but without any of the legal or administrative burdens. It can be created in a matter of hours at no start-up cost to you, compared to the time and financial expense required to create a private foundation.

Successful community leadership has allowed the Foundation to become one of the top 100 community foundations in the nation with \$173 million in assets.

The Foundation's Board of Directors is the region's most respected and accomplished fiduciary which oversees a staff recognized as South Florida's most qualified community and philanthropic experts. Their diverse skills deliver the customer service philanthropists expect from a world-class philanthropic advisor.

Thanks to our 450 personalized charitable Funds, the Foundation has invested more than \$80 million in grants to make Broward better. For Good. For Ever.

Contact us for more information about how you can begin your philanthropic journey. Call 954.761.9503 or visit us online at [cfbroward.org](http://cfbroward.org)

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- ◆ \$173 million in assets
- ◆ 31 years of experience
- ◆ \$80 million in community grants
- ◆ Ranked in top 100 community foundations



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