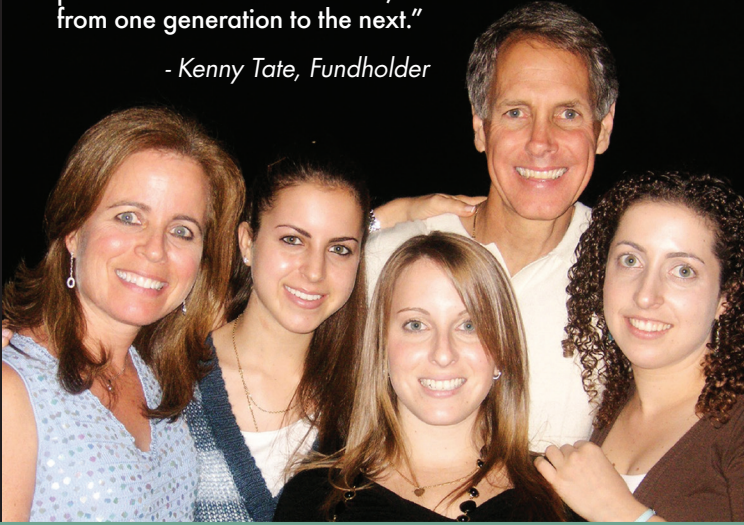


"Giving through our Fund preserves the values we share, from one generation to the next."

- Kenny Tate, Fundholder



COMMUNITY  
FOUNDATION  
OF BROWARD

For Good. For Ever.

# Your Philanthropy Experience

When you open a Fund at the Community Foundation of Broward, you instantly gain a team of experts who maximize the impact of your giving and ensure it is a joyful, rewarding and worry-free experience. Your Foundation team provides expert philanthropic counsel and handles 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

- ◆ Meet your personalized philanthropy and grantmaking team
- ◆ Learn more about the Foundation's calendar of social and educational events
- ◆ Receive your philanthropy playbook with pertinent Fund information

## IMPACTFUL GRANTMAKING

- ◆ Partner with your personal charitable funds manager to create and implement your Fund's grantmaking strategy
- ◆ Be introduced to causes and organizations you can support by your charitable funds manager and through PhilNet, the Foundation's online giving tool
- ◆ Discover the impact of your grantmaking through reporting on success stories and annual Fund snapshots

## PEACE OF MIND

- ◆ Your fund receives world-class oversight through our sophisticated investment portfolio
- ◆ Ensure compliance with ever-changing IRS regulations and best practices
- ◆ Experience the joy of giving, knowing we handle all administrative details

## EDUCATIONAL OPPORTUNITIES AND SPECIAL INVITATIONS

- ◆ Receive regular community updates, including annual reports, newsletters and special publications
- ◆ Receive comprehensive quarterly financial statements of Fund activities
- ◆ Join like-minded philanthropists and community leaders at Food for Thought experiences

## COMMUNITY BUILDER PLANNING

*For endowed Funds of \$1 million or more*

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

## LEGACY SOCIETY

*Join philanthropists who plan to continue their philanthropy beyond their lifetime*

- ◆ Use your current Fund or create a new Fund to be the beneficiary of your estate
- ◆ Access our expert staff to ensure your philanthropic intentions and goals are fulfilled
- ◆ Receive invitations to educational and social events
- ◆ Have your philanthropic intentions acknowledged in our publications or remain anonymous

# Who we are.

**Our Mission:** To provide **leadership** on community solutions and foster philanthropy that **connects** people who care with **causes that matter**.

**Our Promise:** We help families, individuals and corporations create personalized charitable Funds that deliver game-changing **philanthropic impact**.

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 experience philanthropists expect from a world-class philanthropic advisor.

Thanks to our **450 personalized charitable Funds**, the Foundation has invested more than \$89 million in grants to make Broward **BE GREATER**.

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)



- ◆ 450 charitable Funds
- ◆ \$173 million in assets
- ◆ 33 years of experience
- ◆ \$89 million in community grants
- ◆ Ranked in top100 community foundations

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