



**THOUGHTFUL  
PLANNING.  
FOR A  
STRONGER  
COMMUNITY.**

*"The **courage to speak**  
must be matched by  
the **wisdom to listen.**"*

-CHARLES E. MCKENZIE

# YOU KNOW YOUR CLIENTS. HOW WELL DO YOU KNOW THEIR COMMUNITY?

“CENTRAL FLORIDA  
FOUNDATION IS A  
TOOL FOR CLIENTS TO  
ACCOMPLISH THEIR  
CHARITABLE GOALS  
AND IMPACT THE  
COMMUNITY AT THE  
SAME TIME. IT JUST  
MAKES SENSE.”

- RICK HURT

As a professional advisor, you're always working to honor the interests of your clients while safeguarding their investments. For clients who wish to make a difference in the community, Central Florida Foundation can work alongside you to help them develop a strategy that yields true, meaningful impact.

As the region's community foundation, we know the individuals, nonprofits and initiatives that address community issues in Central Florida. We will work with you and your clients to identify the right direction for their philanthropic ambitions.



PHILANTHROPY IS PERSONAL.

# WE MAKE IT POWERFUL



**MAKE STRONGER GIVING DECISIONS  
WITH NONPROFIT SEARCH,  
CENTRAL FLORIDA FOUNDATION'S  
GO-TO PLACE FOR IN-DEPTH  
INFORMATION ON NONPROFITS IN  
THE REGION.**

Receive **giving strategies** and **expert advice** fit for your clients' passions, goals and interests.

Tap into our **deep knowledge of community issues** and the initiatives addressing them.

Trust that we are as **committed to rigorous investment oversight** as you are.

Leave the administrative details, compliance and due diligence to **our knowledgeable team**.

**Protect the privacy of your clients** if necessary by keeping their investments anonymous.

**“WHEN PEOPLE  
THINK ABOUT  
PHILANTHROPY,  
THEY CAN EASILY  
FEEL OVERWHELMED,  
BUT IT'S NOT  
ONE-SIZE-FITS-ALL.”**

**- MICHELLE CARLTON**

# PHILANTHROPY IS EQUAL PARTS GENEROSITY & STRATEGY

For your clients' philanthropic mission, how they give is just as important as how much. Central Florida Foundation offers a number of ways to invest in the change your clients want to make. Whether they wish to support a single nonprofit or contribute to solve some of our community's biggest challenges, we'll work with you and your clients to create the right strategy and establish the right fund for their goals, and guide them through investment decisions that lead to meaningful impact.

## SIGNATURE FUNDS

A simple, flexible and more efficient alternative to creating a private foundation. Your client contributes as often as they would like, recommends grants and receives the maximum tax deductions allowed. This option equates to a donor advised fund.

## FOREVER FUNDS

If your client has a passion for a specific nonprofit and its mission or a specific area such as education, arts and culture, the environment and animals, health and human services, religion, or even a geographic area, this is the fund for them.

## IRA ROLLOVER FUND

Have clients give from their IRA Rollover with consideration for community issues that resonate with them.

## IMPACT FUNDS

Established by the Foundation, with community partners, based on pressing needs in the region that require a multi-faceted solution.

## SUPPORTING ORGANIZATIONS

This alternative to a private foundation provides independence and influence, fewer restrictions, and maximum tax benefits for your clients.

## COMMUNITY FUNDS

Allow maximum flexibility to address community issues now and unanticipated issues in the future.

## FUTURE LEGACY FUNDS

Establish a fund on paper now and activate it at a specific point in time, whether it be the sale of a business or end of life.

## EDUCATION FUNDS

Help your clients develop the criteria to honor a loved one or a specific population of students, while giving back to the community with scholarships for education.

## ASSETS

We accept a wide range of assets for investment.

Cash

Appreciated Securities

Real Estate

Life Insurance

IRAs and other Qualified Retirement Plans/Funds

Partnership Interests

Bequests and Trusts

Convert a Private Foundation

## EXPENSES FUEL COMMUNITY CHANGE INSTEAD OF FILLING SHAREHOLDER POCKETS.

When your clients work with Central Florida Foundation, the expense on their fund goes back into the community and makes a bigger impact. They fuel the work we do, alongside your clients, at CFF — getting to know local nonprofits, collaborating with community leaders and developing high impact solutions to the region's pressing challenges. You are always a part of something bigger.

# CHARITABLE INSTRUMENTS WHAT YOU CAN GIVE

## CASH

A popular and simple way to give that provides an immediate tax deduction.

## APPRECIATED SECURITIES

We accept both closely held and publicly traded stock. Give appreciated stock or mutual fund shares that you have held for more than one year and avoid capital gains taxes and earn a charitable tax deduction based on the market value.

## REAL ESTATE

If held for more than a year, real estate usually provides the same tax benefits as gifts of securities.

## LIFE INSURANCE

Name Central Florida Foundation as owner and beneficiary of a policy or retain ownership and name us as primary or contingent beneficiary.

## IRAS AND OTHER QUALIFIED RETIREMENT PLANS/FUNDS

Heirs may realize substantial tax savings if you name a charitable fund as beneficiary of your retirement plan. Name charities to benefit from your fund or name heirs as advisors.

## PARTNERSHIP INTERESTS

We consider gifts of limited liability company interests and limited partnership interests.

## BEQUESTS AND TRUSTS

Establish a charitable fund through a will or other giving vehicle because it's simple, minimizes estate taxes and can be advised by heirs. Contact us for sample language.

## CONVERT A PRIVATE FOUNDATION

There are several reasons to convert a private foundation. We are happy to share more with you about the benefits. A signature fund or a supporting organization are two options to consider when converting a private foundation.

## You Receive Personalized Service

Each individual, family, business and professional advisor we work with has unique charitable interests and unique financial circumstances. We help you make the most of both so you receive the greatest return on your investment in the community.

For more information visit [cffound.org](http://cffound.org) or contact Nicole Donelson at [NDonelson@cffound.org](mailto:NDonelson@cffound.org) or 407.872.3050.

# THERE IS NO SUCH THING AS “ONE-SIZE-FITS-ALL” PHILANTHROPY

To help you fine-tune a strategy that fits your clients' giving goals, Central Florida Foundation offers a variety of charitable instruments and provides expert guidance in a number of areas, including the following:

## **SALE OR DISPOSITION OF APPRECIATED STOCK**

Clients who wish to use significant stock gains for charitable giving can avoid capital gains tax and receive a tax deduction on full market value by establishing a fund with us.

## **ESTABLISHING A PRIVATE FOUNDATION**

The Foundation can help you and your client analyze the pros and cons of creating a Signature Fund, a supporting organization or a private foundation.

## **INVESTING CLOSELY HELD STOCK**

For clients whose net worth is tied up in a closely held company, establishing a Signature Fund or planned gift is a smart way to give back to their community.

## **SALE OF A BUSINESS**

Our team can work with you to suggest several ways to structure a charitable gift to help your client reduce capital gains tax and maximize impact to the community.

## **GRANT-MAKING FOR GREATER IMPACT**

When a client is passionate about addressing a specific community need, our grant-making team will help you understand how they can give for greatest impact.

## **DISTRIBUTION OF SUBSTANTIAL IRA/401K ASSETS**

Central Florida Foundation can help you and your client find the most beneficial asset distribution to minimize taxes and preserve charitable intent.

## **ENGAGING MULTIPLE GENERATIONS IN PLANNING**

We help you and your clients develop succession plans and investment strategies that involve more than one generation and contribute to a long-term legacy.

## **WHEN SHOULD YOU TALK TO YOUR CLIENTS ABOUT CHARITABLE GIVING?**

Even if your client has not expressed charitable intentions, bringing up philanthropy allows both of you to consider all options. When discussing year-end tax planning, estate preservation and/or retirement planning, make philanthropy part of the conversation.

CENTRAL FLORIDA FOUNDATION

# BUILDING COMMUNITY BY BUILDING PHILANTHROPY



In 1994, ten visionary thinkers gathered around a table to discuss a simple question: how can we really change Central Florida for the better?

The answer was to join forces not just with their dollars, but with the full power of their vision, passion and community connection. Only then, could they drive deep and lasting social change. This partnership evolved into the Central Florida Foundation.

**400+ FUNDS**

**\$80 MILLION OF  
INVESTMENTS MADE INTO  
THE COMMUNITY TO DATE**

We're building a permanent source of charitable capital, so we can invest in what makes Central Florida stronger and better, forever.

As the region's community foundation, Central Florida Foundation stewards philanthropic dollars on behalf of multiple individuals, families and nonprofits to drive true community change. These fundholders care about making a real difference in our community. And they know real change demands more than dollars and cents.

*Real change requires your  
head, heart, and wallet.*

WE ARE A LAUNCHPAD FOR

# HIGH-IMPACT PHILANTHROPY

Central Florida Foundation is transforming our community, targeting the most critical challenges of today, and those on the horizon, through High-Impact Philanthropy.



## COLLABORATION

We bring all the essential partners to the table—researchers, policy makers, business leaders, supporters and other stakeholders.



## IDEAS

We generate ideas to address the root cause of the challenge rather than simply fixing the symptoms.



## INVESTMENT

We connect strategy to philanthropy, coordinating community-wide investment into one-of-a-kind solutions.



## INNOVATION

We pilot big-picture, systemic solutions with the potential to change things for good. True impact requires unique approaches to issues.



## LEGACY

We create real, lasting change as stewards of our community's resources, passion and investment that will last well into the future.

We've served Central Florida since 1994. With our deep roots and even deeper understanding of our region, we're ready to drive true impact across our community for generations to come.