Fairfield County's Community Foundation

Why Work With Us?

Make a bigger difference in Fairfield County and beyond through personalized giving.

While many commercial financial institutions offer donor-advised funds and other tax-advantaged philanthropic vehicles, when you choose to partner with Fairfield County's Community Foundation, you're more than just an account number. Our team of philanthropic experts are committed to listening to your charitable and financial goals and helping you maximize your impact – right in your own community.

Experience the Community Foundation difference

Our dedicated staff is committed to helping you in your philanthropic journey. When you work with our team, you'll be able to:

Tap into local knowledge. Our staff's deep knowledge of high-performing Fairfield County nonprofits and your region's most pressing needs can help you channel your dollars most effectively.

Create a personal charitable plan. Our philanthropic advisors can work with you one-on-one to customize your giving experience to meet your personal, financial and impact goals.

Be part of a network of like-minded people who are committed to making our community a better place. If desired, you can also learn about and participate in collective giving opportunities and make a greater impact by pooling your gifts.

Stay current on community needs and progress. We'll keep you informed through personal outreach on the latest local research, community initiatives, and opportunities for impactful giving.

Access your account at any time. You can view fund details and make grant recommendations at your convenience through our easy-to-use web portal.

"We've relied on the Community Foundation's thorough research so we could give wisely, get exposed to different nonprofits, and learn about our community's needs. We found the right places to donate and felt good about it. Because what's this world like if you can't help other people?"

Joan Weisman, Fundholder

Ready to help your community thrive?

With donor-advised fund minimums now starting at $5,000, it's never been easier to make a difference on issues that matter to you. Let's talk about doing more with your philanthropy. Contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org**.

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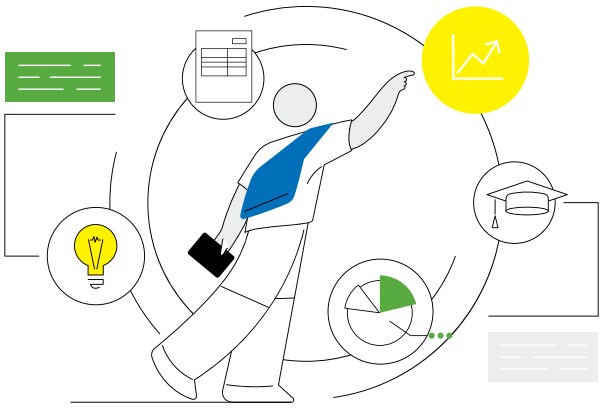
Fairfield County's Community Foundation

Explore Our Capabilities



Optimize your impact by tapping into our advisory & back office services.

As one of Connecticut's most well-established community foundations, our dedicated team offers best-in-class services to help you meet your philanthropic goals and maximize your social impact. Many of the below services are included in the annual management fee for Executive Care Plan donor-advised fundholders – and fundholders of all levels can access any of our services through a negotiated agreement. We strive to offer our services at a reasonable cost and free up your time and resources so you can focus on making the greatest impact possible.

Individual & Family Giving Strategies

We partner with you to define or refine short- and long-term giving goals and strategies that maximize tax and estate planning benefits. We can also help you identify emerging opportunities for effective grantmaking, and develop a family giving plan for current and future generations that includes guiding principles, definition of roles and coaching on best practices.

Nonprofit Research & Evaluation

We handle the legwork of vetting potential grantees' nonprofit status, and financial and organizational performance. Want to give in Fairfield County, but don't know which nonprofits to support? We can connect you to organizations doing great work in your interest areas, and even arrange site visits so you can evaluate programs and procedures.

Collective Giving Opportunities

We direct you to exciting funders' collaboratives for a wide range of critical subjects, from ending homelessness to closing educational, workforce and other opportunity gaps for youth and families.

Grant & Scholarship Administration

We work with you to develop a grantmaking strategy that aligns with your priorities and maximizes impact. Our comprehensive services include managing open grant and scholarship program cycles; hosting an online application process; evaluation and screening of applicants; tracking and reporting; assistance in designing grant agreements and compliance requirements; providing full or first-level review for compliance of application criteria; and advising on ways to solicit grant and scholarship applications through marketing and communication strategies.

"I love what they are doing here. The committee members and staff are all very professional, knowledgeable, and highly dedicated to helping (people) throughout Fairfield County and supporting me in fulfilling my philanthropic goals."

Dr. Maya Reddi, Board Chair, Fairfield County's Community Foundation

Let's partner to make your giving even more effective.

To learn more about our customized support and advisory services, or to request specific support, contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org.**

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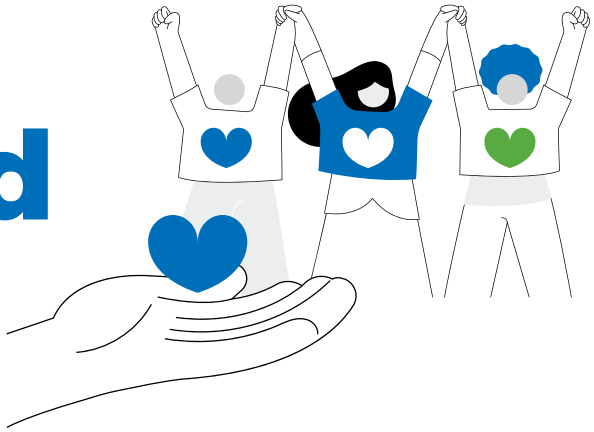
Donor-Advised Funds



Picture a community where each member has a safe, affordable place to call home. All children have access to quality education. People of all backgrounds feel welcomed. Quality health care is available to everyone. You can help create that future through a donor-advised fund at Fairfield County's Community Foundation.

What is a donor-advised fund (DAF)?

A donor-advised fund is a simple, flexible, and tax-friendly way to give to your favorite charities. Here's how it works:

- Establish a fund with an initial contribution.
- Get an immediate tax deduction.
- Managed by the Community Foundation, your fund will grow tax-free.
- You make recommendations for grants to your chosen charities whenever you want.

It's easier than you might think to help your community to thrive.

A fund that supports local nonprofits tackling the issues most meaningful to you can be started with $5,000 — and you can immediately begin making your impact on our community. When you give through a donor-advised fund at Fairfield County's Community Foundation, you join with other like-minded community members and have access to the knowledge of our team of local experts who can guide you on how to achieve your philanthropic goals.

Is a DAF right for you?

A donor-advised fund is ideal for families and individuals who want to:

- Conveniently give to qualified nonprofits worldwide.
- Focus on giving while we take care of the administrative details.
- Make funding decisions independently or be supported by our team of local experts and national network of community foundation partners
- Make tax-advantaged charitable contributions of any amount to build your fund over time.
- Teach your children and grandchildren about giving back.
- Be acknowledged for your contributions or give anonymously.

Lily Ann Marden, Co-Founder The Julia Ghahramani Foundation
This donor-advised fund was established by her parents in memory of Julia, pictured here (center) with her siblings on her graduation day.

"We want to help other young people who are trying to change the world, and instill these ideals that a younger generation can help change the world for the better."

Experience the joy of giving

Let's talk about doing more with your philanthropy through a donor-advised fund. Contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org**.

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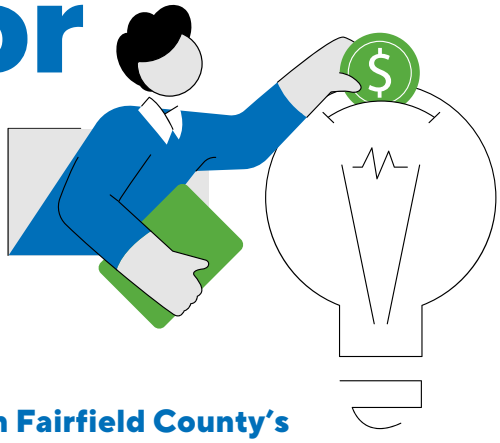
Corporate Donor Advised Funds



Welcome to a new era of corporate citizenship, where profits meet purpose.

Businesses like yours—with big hearts and deep community roots—seek to drive positive change in the community where your employees live, work, and play. When you establish a corporate donor-advised fund (DAF) at the Community Foundation, you'll be working with a partner that takes time to understand your goals and helps you create a plan for making the biggest possible impact with your charitable contributions. You'll improve your reputation with your customers and build morale among your employees—and we'll handle all of the administrative details for setting up and managing your fund.

Corporate fundholders include:

indeed

DIAGEO

Carter Morse & Goodrich
Investment Bankers Since 1987

Santa ENERGY

Koskoff

Why partner with Fairfield County's Community Foundation?

With a corporate donor-advised fund, you'll tap into our deep understanding of Fairfield County to direct your philanthropic dollars effectively.

- **Get straightforward, research-based information** about the opportunities and challenges facing our community.

- **Invest in the nonprofits making the biggest difference**—locally or beyond. With support available from our local experts and national network of community foundations, you can choose organizations doing the most promising work on issues that align with your company's interests. Whether it's workforce development, education, housing, or another issue, you'll have the ability to give to the causes that matter most to your business and your employees.

- **Enhance your company's reputation** as a caring, committed community partner.

"Santa Energy wanted to do even more for the community. We know our grants are generating goodwill, and we hope the Community Foundation continues to let us know where help is needed so we can find new opportunities to put the money to good use."

Tom Santa, CEO, Santa Energy (Retired), Fundholder, The Santa Family Fund

Get started today

Talk with us about establishing a donor-advised fund through your business. Contact Rebecca Mandell, Director of Corporate & Foundation Relations, at **RMandell@FCCFoundation.org** or (203)750-3200.

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Fairfield County's Community Foundation

Fund or Foundation?

Find out whether a donor-advised fund meets your needs better than a private foundation.

A private foundation can help you accomplish philanthropic goals. But donor-advised funds are often a more flexible and cost-effective option for achieving similar results. When you create a donor-advised fund at the Community Foundation, you can recommend grants while we handle all recordkeeping and administration – bypassing the hands-on legal, financial, and administrative management required by a private foundation. A donor-advised fund also offers greater and more immediate tax benefits, with an option to give anonymously if so desired.

POINTS TO CONSIDER	DONOR-ADVISED FUND	PRIVATE FOUNDATION
Naming Option	[Your Choice of Name] Foundation	[Your Choice of Name] Foundation
Tax Status	Public charity - a component fund of the Community Foundation	Private foundation
Donor's Role	Donors recommend grants to eligible nonprofits, and may name successor advisors. Investments are managed by the Community Foundation.	Private foundation's board controls investment, grantmaking, and administration.
Privacy	Full donor anonymity, if desired	All information about assets, gifts, and grants is public
Minimum Contribution to Start Fund	$5,000	Typically, millions of dollars
Annual Payout Requirement	None	5% of foundation's assets
IRS Reporting	Handled by Fairfield County's Community Foundation	Annual IRS Form 990 required
Liability and Risk Insurance	Covered by Fairfield County's Community Foundation	Purchased by the private foundation
INCOME TAX DEDUCTIONS		
Cash Gifts	Limited to 60% of adjusted gross income	Limited to 30% of adjusted gross income
Appreciated Stock Gifts	Fair market value, limited to 30% of adjusted gross income	Fair market value, limited to 20% of adjusted gross income
Real Estate & Closely Held Stock Gifts	Fair market value, limited to 30% of adjusted gross income	Fair market value, limited to 20% of adjusted gross income
PHILANTHROPIC SERVICES		
Establishment and Incorporation	One simple fund agreement required; covered by the Community Foundation's tax-exempt status	Formation of corporation or trust required; must apply to IRS for tax-exempt status
Grantmaking	If desired, we help identify and vet potential grantees and monitor grant outcomes	Must establish and maintain independent grantmaking and monitoring procedures
Administration	All recordkeeping and financial services handled by Fairfield County's Community Foundation	Foundation board or hired staff handles accounting, investment, IRS filings, and all expenses
Excise Taxes	None	Up to 2% of foundation's net annual investment income

This chart is simplified for clarity. Fairfield County's Community Foundation does not provide legal, tax, or financial advice.

Simplify your giving

Want to explore the benefits of a donor-advised fund versus a private foundation? Let's talk.
Contact Joseph Collin, Vice President of Philanthropy, at 203-750-3211 or **JCollin@FCCFoundation.org**.

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Convert a Private Foundation

Find out how to make the switch to a donor-advised fund.

Over time, private foundations can run their course or may simply no longer be the best way to maximize your charitable goals. If the responsibilities of managing your private foundation have become overwhelming or the costs impractical, talk with us about converting to a donor-advised fund at Fairfield County's Community Foundation. This can lighten your administrative load, while you continue to support causes and nonprofits that matter to you. You can also benefit from our expert investment strategies and community grantmaking expertise, while ensuring that your philanthropic intentions will be carried out for future generations.

What steps are required?

Our knowledgeable team can help you navigate the following basic steps to convert your private foundation into a donor-advised fund.

Get Board Approval. Your board must review state laws and governing documents to confirm that dissolving your private foundation is permissible.

Pay All Outstanding Liabilities. Assets in a donor-advised fund can only be used for qualifying charitable purposes. So, any outstanding obligations such as taxes, grant payments, or fees must be paid before you transfer assets from your private foundation. A reserve must also be created for any additional anticipated expenses.

Create a New Fund. Work with our staff to set up a donor-advised fund. We make it easy and fast for you to select your preferred name (you may choose to keep your foundation's name), advisors, and investment strategy.

Transfer Your Assets. Fairfield County's Community Foundation is a public charity, so transferring assets from your private foundation is similar to issuing a grant to any other charity. We can accept various asset types such as cash, stock, and real estate. If you have complex or illiquid assets, talk with us about the best way to proceed.

Complete a Final Tax Filing. After the asset transfer is complete, you'll need to complete all final tax paperwork with the state of origin and the IRS—including the final Form 990—before your private foundation is officially dissolved.

"The support we got was amazing, and the transition to Fairfield County's Community Foundation was seamless."

Dennis Torres, Communications Advisor, The Amalia & Nicola Giuliani Foundation for Religion & the Arts

Get started

Want to explore converting a private foundation to a donor-advised fund at Fairfield County's Community Foundation? Contact Joseph Collin, Vice President of Philanthropy, at 203-750-3211 or **JCollin@fccfoundation.org.**

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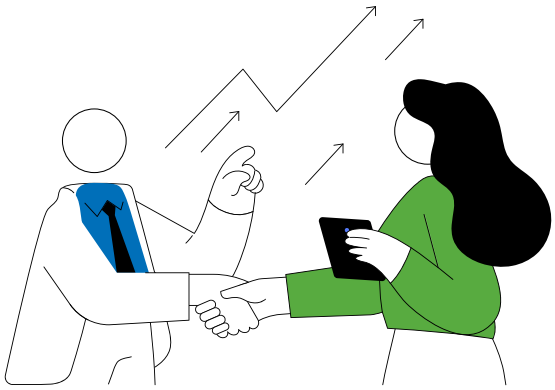
TOGETHER WE THRIVE

PROFESSIONAL ADVISORS RESOURCE KIT



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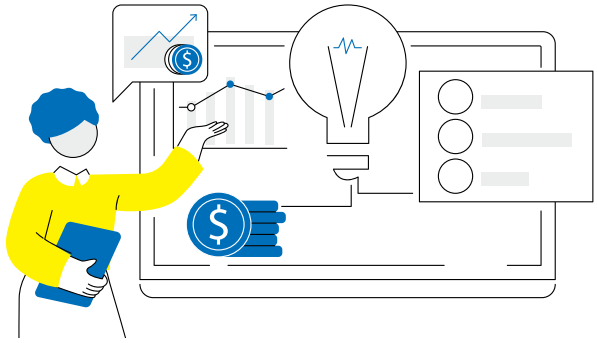
Investment Options

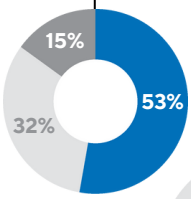


Select the investment model that best fits your philanthropic goals.

LONG-TERM OPTIONS

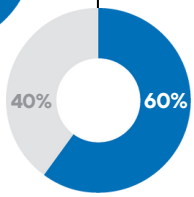
Investment Pool

This global balanced fund is the most common investment choice. Using well-researched, high-quality, and regularly monitored investments, this highly diversified, risk-adjusted portfolio seeks long-term growth which supports both current and future programmatic work and grantmaking. Money managers are selected by our Investment Committee with the assistance of a neutral investment consultant. The policy allocation is **53% Equity, 32% Alternative Investments, and 15% Fixed Income.**



Vanguard Index Fund (VBIAX)

This single-strategy investment leverages the Vanguard Balanced Index Fund Admiral Shares, a passively managed mutual fund. This option is ideal as a low-cost choice to gain exposure to stocks and bonds with a long-term investment horizon. The target policy allocation is **60% Equity and 40% Fixed Income.**



INTERMEDIATE & SHORT-TERM OPTIONS

Asset allocation for intermediate investments may vary depending on market conditions and investment horizons. The target allocation range for the intermediate-term options is **50% to 80% Equity, 42% to 12% Fixed Income, and 8% Alternative Investments.**

Non-endowed Investment Choices

The following pools are managed to match a donor's intent of immediate and sizable grantmaking, with an investment objective of moderate growth and sufficient liquidity. Using well-researched, high-quality, and regularly monitored investments, this diversified, risk-adjusted portfolio supports both current and future grantmaking. It invests in equity and fixed income assets.

Raymond James Investment Option

This diversified portfolio is made up of twelve mutual funds and ETF strategies that offer liquidity and simple market valuation. This investment is suited for a three-to-seven-year grantmaking plan, with estimated fees of 0.51%.

Intermediate Investment ESG-Aware Pool

This diversified portfolio is comprised of twelve mutual funds and ETF strategies selected to deliver ESG-driven products, liquidity, and simple market valuation. This option is well-suited for donors with a three-to-seven-year grantmaking plan, and a preference for transparency and social impact. Estimated fees for this fund are 0.60%.

Ultrashort Fixed Income Pool

This investment option invests in cash and cash equivalents to maintain liquidity similar to a traditional money market pool, offering the least amount of risk with a corresponding lower yield. This can be a desirable option if immediate or near-term grant recommendations are planned, or when used as a complementary strategy alongside other investment options.

Prefer to work with your own investment advisor?

Donors who maintain a fund with a minimum value of $250,000 may choose to keep their own investment manager or name an external qualified advisor to manage their investments. We will work with the advisor to maintain a reasonable asset allocation, manage cash flow, and approve investments changes.

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Donor-Advised Fund Support Options

Choose the level of service that best fits your donor-advised fund.

Let our experienced team guide you on your philanthropic journey by conducting research, creating strategy, and sharing recommendations that align with your values and goals for your donor-advised or corporate donor-advised fund.

	Express Plan	Partner Plan	Navigator Plan
Minimum to open fund	$5,000	$25,000	$100,000
Spendable or Endowed?	Spendable only	Spendable only	Spendable; Endowed or Fund Functioning as an Endowment
Setup fee	$250 (no admin fee for year one)	None	None
Annual fund administration fees	$150 (after year one)	1% of balance, or minimum of $500	1% of balance, or minimum of $1,000
Minimum balance to keep fund open	$500	$2,500	$10,000
Investment options	Raymond James or money market	Raymond James or money market	All investments
Method for Initiating grant	Web portal only	Web portal only	Donor choice
Minimum grant amount	$100	$500	$500
Maximum annual grant disbursements	5 checks	15 checks	Unlimited
Fee for excess grant checks	10% of grant value	$25	None
Grant processing frequency	Monthly	Weekly	Weekly
Annual deposit transaction limit*	5 transactions	15 transactions	Unlimited
Philanthropic advice	Limited local advice	Limited local and national advice	Local, national, and international advice

*One-time deposits beyond this amount incur a per-transaction fee. Recurring credit card transactions do not incur an associated fee.

Get started

With donor-advised fund minimums now starting at $5,000, it's easier to make a difference on issues that matter most to you. Want to explore the fund care plan level that's right for you? Contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org**.

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Fund Management Fees

We strive to keep administrative costs low, so you can make a greater impact.

The Community Foundation follows a sliding fee structure for funds with a balance of more than $1 million, while minimizing costs for smaller funds by offering streamlined service options. Our philanthropy team is authorized to negotiate a fee beyond the standard schedule below to cover additional support that may be needed, such as outside consulting or legal work, or the processing of an unusually high number of gifts.

	Agency Endowment Fund		Designated Fund		Field of Interest Fund		Scholarship Fund			
	Agency Endowment	Agency Non-Endowment	Designated	Designated Non-Endowed	Endowed	Spendable	Endowed	Spendable	Renewable	General Fund
Minimum to open fund	$50K	$25K	$50K	$25K	$50K	$25K	$100K	$10K	$100K	$500
Spendable or endowed?	Endowed	Spendable	Endowed	Spendable	Endowed	Spendable	Endowed	Spendable	Either	Spendable
Setup fee	N/A	$250	N/A	$250	N/A	$250	$250	$250	$250	N/A
Annual fund administration fees	1% or $500 minimum Tiered fee > $1mm	1% or $500 minimum Tiered fee > $1mm	1% or $500 minimum Tiered fee > $1mm	1% or $500 minimum Tiered fee > $1mm	1.6% or $500 minimum Tiered fee > $1mm	1.6% or $500 minimum Tiered fee > $1mm	1.5% or $500 minimum Tiered fee > $1mm	1.5% or $500 minimum Tiered fee > $1mm	2.5% or $1,000 minimum	1.5% or $500 minimum Tiered fee > $1mm
Minimum balance	$5K	$1K	$5K	$1K	$5K	$1K	$5K	$5K	$5K	$1K
Investment option	All	Raymond James	All	Raymond James	All	Raymond James	All	Raymond James	Raymond James	Raymond James
Minimum grant amount	$500	$500	$500	$500	$500	$500	$2K	$2K	$2K	N/A
Maximum annual grant disbursements	Unlimited	Unlimited	5	5	5	5	Unlimited	5	Unlimited	Unlimited
Fee for excess grant checks	N/A	N/A	$50	$50	$50	$50	N/A	$50	N/A	N/A
Annual deposit transaction limit*	Unlimited	Unlimited	5	5	5	5	Unlimited	5	Unlimited	Unlimited

*One-time deposits beyond this amount incur a per-transaction fee. Recurring credit card transactions do not incur an associated fee.
Note: The above information does not apply to funds managed through our Investment Advisor Program. Additionally, donor-advised funds follow a separate fee schedule. All investment performance information is presented net of investment manager fees.

Get more information

To learn more about fund types and fee structures, contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org**.

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Investment Advisor Program

Keep your own investment advisor, and partner with us to give.

Through our Investment Advisor Program, a donor may set up a new fund at the Community Foundation and work with their personal investment advisor on a customized investment approach. The donor benefits from our program expertise in reaching their philanthropic goals, while the advisor continues to represent their client in managing charitable assets.

Customization at this level could include both traditional asset classes and, in some circumstances, alternative investments. Assets continue to be held at the investment advisor's institution, while ownership of the assets transfers to Fairfield County's Community Foundation.

Fees

Fairfield County's Community Foundation collects the following administrative fees for administrative services including, but not limited to, professional advice and consultation regarding grantmaking, strategic philanthropic planning, in-depth knowledge of local charities, and access to online fund information including grant processing and fund statements.

1.0% on the initial $1 million in assets
0.9% on incremental assets from $1 to 1.99 million
0.8% on incremental assets from $2 to 2.99 million
Fee assessment decreases for funds $3M+
.10% fee discount for permanent funds

Minimum annual fee: $1,000
Minimum grant amount: $500

The fee for investment services will be negotiated by the Community Foundation and the donor's investment advisor, and will be disclosed to the donor when the fund agreement is executed. All fees are charged at the fund level.

Individually managed accounts with balances below $250,000 will be transferred to the Community Foundation's investment pool.

The Community Foundation's Investment Committee must approve the advisor selection and proposed investment strategy, working together to establish an asset allocation that is appropriate to the grantmaking goals of the donor. Other policy guidelines are applicable.

"To feel completely comfortable with a financial partner is a great blessing. Fairfield County's Community Foundation has earned my trust again and again with their local expertise and spot-on counsel."

Eleanor Harrison Smith, Investment Advisor Program Fundholder

Ready to start the conversation?

For more information or to get started, contact Joseph Collin, Vice President of Philanthropy, at (203) 750-3211 or **JCollin@FCCFoundation.org.**

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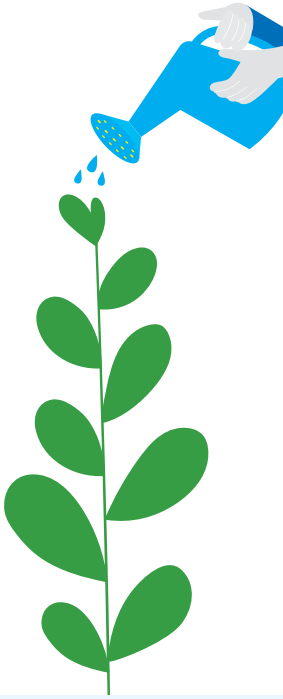
The Future Society

Forward Thinking: Creating Your Philanthropic Legacy



While every donor has the power to create positive change in their communities, some go even further. They see the possibility to sow seeds of lasting progress beyond the boundaries of their lifetimes. These visionary partners are at the heart of The Future Society at Fairfield County's Community Foundation.

When you include the Community Foundation in your estate plan—through your will, trust, or other assets—you affirm your enduring dedication to the wellbeing of your community as your gift provides grants to nonprofits working to boldly create solutions for generations to come.

Joining the Future Society may be the most meaningful decision you'll ever make.

When you become part of this special group of generous individuals who include the Community Foundation in their estate plan, you'll join our Future Society members in experiencing:

The Joy of a Lasting Legacy
Discover the profound satisfaction of creating lasting support for causes you care about most.

A Network for Good
Connect with like-minded people who share your commitment to building a brighter future.

Collective Impact
Your generous gift will be amplified by contributions from other donors, maximizing your impact.

Flexibility and Control
Modify your giving plan as your circumstances or philanthropic goals evolve.

The Community Foundation Advantage

The Community Foundation has deep roots and expertise in Fairfield County. We have an intimate knowledge of the region's unique challenges and the bold solutions to address them. We provide our donor partners access to this expertise and a large network of organizations and leaders making a difference.

Whatever your stage of life, we're here to help you create a plan that meets your philanthropic vision and financial goals. Your gifts—from wills and trusts to other assets—can support specific charities or enable the Community Foundation to meet the region's most pressing needs. No matter your age or your income, you have options to create a forever gift to your community. Importantly, your gifts grow over time, giving back to the community in meaningful ways—forever.

Your Planned Giving Options

Partner with us to design a planned giving strategy that addresses your specific goals—both philanthropic and financial—well into the future. We can help you explore planned giving options like:

Bequest: By naming the Community Foundation as a beneficiary, you gift us your assets (cash, stocks, appreciated securities, or personal property) after your lifetime—in any amount or a percentage of your estate.

Life Insurance: When the original purpose for a life insurance policy no longer applies, you can name the Community Foundation as a beneficiary of the policy as a meaningful way to support your community.

Retirement Assets: When retirement assets pass to your heirs, they can be subject to estate and income taxes. As a result, many donors choose to fund their charitable giving by designating the Community Foundation as the beneficiary of their retirement accounts.

Real Estate: Giving real estate as a charitable contribution can create an enduring legacy, while unlocking several tax, income, and estate planning benefits.

Charitable Lead Trust: You transfer assets into a trust that makes payouts to the Community Foundation for a fixed number of years—while you receive tax benefits. At the end of the trust term, your designated beneficiaries receive the remainder of the trust with substantial tax savings.

Charitable Remainder Trust: You and/or others you designate receive annual income for life or for a fixed term, while you receive the tax benefits. Then, at the end of the income period, the trust's remaining assets pass into a permanent fund at the Community Foundation.

Explore More

To access the full range of our planned giving options, our charitable gifts calculator, and other planned giving tools and resources, visit FCCFLegacy.org.

"The Community Foundation has been a resource for helping me decide where to give. The knowledge it has accumulated regarding the needs of the community in Fairfield County is impressive. The Community Foundation will continue my giving after I am no longer here — and I know it will do it well."

Jeremy Main, Future Society Member

Ready to start the conversation?

Let's talk about how you can plan a gift that transcends time. Contact Sara DeRose, Director of Development & Philanthropic Services, at (203) 750-3210 or SDeRose@FCCFoundation.org.

Fairfield County's Community Foundation

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