@dvisor nsight

Individuals

The Community Foundation is here to help your client reach their charitable goals, whatever those might be. We'll help them:

- Build a personalized philanthropic plan with assistance from our expert staff
- Network with others with similar interests
- With our knowledge of our region and its nonprofits to enhance their giving
- Remain anonymous, if that suits their giving style
- Consider not only their lifetime giving, but their permanent legacy

Families

We help bring families together around giving and pass along their philanthropic values to the next generation with a fund at the Community Foundation. We can:

- Help families develop a mission statement and define charitable interests and goals
- Develop a list of organizations and programs that match a family's interests
- Facilitate annual family meetings to consider grants from their fund
- Support their personal development as philanthropists
- Handle all back-office work and reporting

Businesses

Outsource the work of a corporate foundation or charitable giving program to the Community Foundation; use donor-advised funds to meet goals.

- Create a charitable program consistent with business goals
- Involve staff as much or as little in decisions
- Leave all the back-office work and reporting to the Community Foundation

Another advantage: ask us how to convert privately held stock or partnership interests into a tax-advantaged charitable fund.

Foundations

Here are some ways that family and private foundations have used the Community Foundation to further their philanthropic goals

- Invest for the maximum impact in an unfamiliar area
- Contract with the Community Foundation to support a foundation with grant making and/or administrative services
- Ensure the Foundation Founder's purpose will live on – despite the challenges faced by succeeding generations and faraway family members
- Fulfill a payout requirement by contributing to a donor-advised fund at the Community Foundation

☐ **Assets of CFNTX:** $160 million

☐ **Number of Funds:** 162

☐ **Administrative Fee:** .85% annually assessed on average monthly fund balance (lower fees on funds over $5 million).

☐ **Investment Options:** Liquid, balanced or equity oriented

☐ **Investment managers:** Luther King Capital Management; Commonfund, Inc. (other investment options are available for funds over 1 million)

Community Foundation OF NORTH TEXAS