

Helping local organizations sustain and grow Designated Fund



Establishing a Designated Fund allows you to support the good work of a specific nonprofit organization. Because it's given through the Community Foundation for Southern Arizona, your gift provides the organization you select not only funding, but planned giving and investment management services and the power of endowment.

How it works

- You identify an organization that you wish to benefit.
- You make a gift to the Community Foundation for Southern Arizona. You can give cash, stocks, real estate, or other assets.
- We set up a special fund in your name or in the name of the nonprofit organization you choose.
- You receive tax benefits in the year your gift is made.
- Our board issues grants to the designated nonprofit organization.
- We handle all the administrative details, including managing specific qualifications that you may establish for grant disbursements.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift, and all future earnings from your gift, is a permanent source of community capital, helping to do good work forever.

A source of strength

Wendell Pittman delivers meals to home bound senior citizens as a volunteer for Meals for Seniors.

After talking with the Executive Director of Meals for Seniors, Mary Burns, and with his financial advisor, Wendell decided to begin a Designated Fund at his community foundation.

He donated a piece of rental property that was becoming a bother in his retirement. The community foundation immediately sold the property and established the Meals for Seniors Designated Fund.

“Our organization is thrilled to be working with the community foundation,” says Mary Burns. “Meals for Seniors would not have been able to do this on its own.”

Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our professional program staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

More benefits

A Designated Fund provides you a wonderful way to give back to one or more specific organizations that have touched your life. Your gift provides more than just funding. Your favorite organization will benefit from CFSA's investment stewardship and ability to manage endowment funds. Because we handle the details, the nonprofit organization's staff is freed up to focus on its mission. And, CFSA can facilitate even the most complex forms of giving, such as planned gifts or gifts of appreciated stock or real estate.

You can add to the fund at any time. If the organization you select ceases to exist or changes in mission, the fund can be redirected so that it continues to address your charitable intent.

The Community Foundation for Southern Arizona provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets. Most charitable gifts qualify for maximum tax advantage under federal law.

For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or give us a call.



2250 E. Broadway Blvd.
Tucson, AZ 85719
Tele: 520-770-0800
Fax: 520-770-1500
www.cfsoaz.org