PROFESSIONAL ADVISORS TOOLKIT

2026

COMMUNITY FOUNDATION
OF GREATER
GREENSBORO

TABLE OF
CONTENTS

WELCOME MESSAGE

Collaborating with the Community Foundation of Greater Greensboro empowers financial advisors to offer philanthropic solutions that align with your client's financial goals and charitable aspirations. As a trusted partner, the Community Foundation provides expert guidance and tailored strategies to enhance your client relationships.

This toolkit serves as a resource to help you and your clients learn more about CFGG's vehicles for giving back to Greensboro, which range from Community Endowments and Nonprofit Endowments to Donor Advised Funds and Legacy Giving. Advisors are welcome to work with us behind the scenes or in any capacity that helps you best deliver true value and expertise to those you serve.

- **Community Endowments provide permanent annual funding to address the evolving needs of Greensboro. Donors choose for their fund to be used wherever the need is greatest—within a general field of interest (like education or workforce development) or for a specific cause like affordable housing for seniors.**
- **Nonprofit Endowments ensure permanent annual funding for a specific nonprofit, either for general operating expenses or a certain purpose or program. These can be set up by a donor or a nonprofit organization.**
- **Donor Advised Funds make philanthropy simple and provide significant tax benefits. Donors get an immediate tax benefit and they can then make grants as they like to the charities they care about at their own pace.**
- **Legacy Gifts to the Community Foundation can be made to support the organizations and causes that are important to a donor in their lifetime.**

Our team is ready to work with you to provide your clients with personalized, efficient processes to enhance the impact of their philanthropy and strategically give to organizations about which they are passionate.

However your clients decide to engage in charitable giving, the Community Foundation is happy to work with you to create the best plan for everyone. In the following pages, you'll find information about our programs, fund options, and resources to help your clients as they explore what philanthropy means to them.

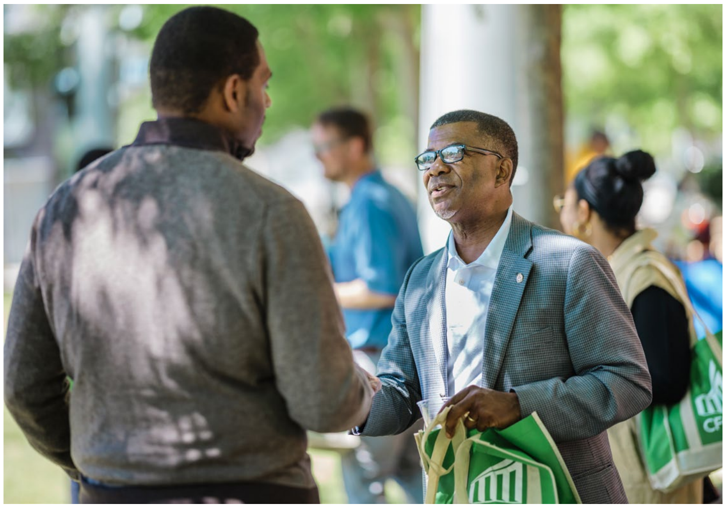
Join us in building a legacy of impact in Greater Greensboro by integrating philanthropy seamlessly into your practice. Together, we can achieve your client's financial objectives while leaving a lasting imprint on our community.

TALKING PHILANTHROPY
WITH YOUR CLIENTS

According to recent studies, 81% of high net worth individuals donate to charitable organizations. By engaging in conversations about philanthropy with your client, you have an opportunity to deepen your relationship and provide comprehensive, unbiased information so they may make good long-term decisions. The Community Foundation of Greater Greensboro is here to provide philanthropic resources you need.

When Should Advisors Have a Conversation about Charitable Giving?

- Writing or revising a will or trust
- Planning for year-end tax strategies
- Preparing for the sale of a business or major asset
- Planning for retirement
- Receiving an inheritance
- During annual financial reviews



The Community Foundation of Greater Greensboro makes it easy and meaningful to give back to Greensboro. Just ask the hundreds of individuals, families, businesses, and nonprofit organizations that have partnered with us. Your clients can join in making an immediate and lasting impact by establishing their own fund or giving to one of our existing funds.

Whether your clients want to give today or in the future, we can help devise a strategy that matches their philanthropic interests. We've created the Grow The Way You Give workbook as a tool to help your clients identify the causes they are most passionate about. This resource can be completed on their own, with their advisor or with a member of the Community Foundation team. We are always happy to help the client research the specific interests they want to explore and begin building a plan to maximize their impact in our community.

WHY PARTNER
WITH CFGG?

Here's why advisors from across Greater Greensboro work with us

REPUTATION

We've been a trusted partner in the community for more than 40 years, with over 700 funds and $300 million in assets.

KNOWLEDGE

We are experts on giving and can provide you with resources on fund types and giving strategies to meet your clients' objectives.

CONNECTIONS

Our staff has the extensive local knowledge and relationships necessary to ensure your clients' contributions can make the largest impact.

OPTIONS

We offer a variety of investment pools as well as outside managed pools for aggregate fund balances of $500,000 or more that allow you to be actively involved in our clients' investment strategy.

FLEXIBILITY

We accept a variety of assets from your clients, including cash, stock, life insurance, real estate, business interests, and more.

ACCOUNTABILITY

The Community Foundation of Greater Greensboro meets the stringent criteria set forth by the National Standards for U.S. Community Foundations.

INVESTMENT OPTIONS

The Community Foundation of Greater Greensboro offers four primary investment options: Main (Long-Term) Pool, ESG Pool, Direct Asset Manager Portfolios, and Charitable Trusts' Portfolios. Most assets are invested in one of the Community Foundation's pools, based on the preference and the time horizons of our donors. Large investment pools benefit from economies of scale in terms of both investment fees and access to types of investment holdings. Over time, lower investment fees result in higher annual grant support for charitable causes.

Main (Long-Term) Pool

Our largest pool to date has a long-term horizon, with a broadly diversified portfolio, including specific allocations to private capital investments. The Investment Committee works with outside consultants and diverse managers to implement the organization's investment policy and strategy.

ESG Pool

Investments for this pool are focused on investment managers and underlying companies that integrate environmental, social, and corporate governance (ESG) factors into their business practices and decision-making processes. As with the Main Pool, the Investment Committee works with outside consultants and diverse managers to implement the organization's investment policy and strategy.

Direct Asset Manager Portfolios

These represent a pool(s) of charitable assets managed by local investment advisor(s) in order to enhance client relationships and facilitate charitable giving to the Community Foundation. The recommended minimum balance for a Direct Asset Manager portfolio is $500,000, and total fees should be comparable to the Community Foundation's Main Pool. Direct Asset Manager accounts may not confer any financial benefit to the donor or related party.

Charitable Trusts' Portfolios

These are charitable trust accounts, established by donors, in which the Community Foundation retains a financial interest. Investment managers may be selected by the donor. Similar to a Direct Asset Manager portfolio, the Investment Committee maintains all fiduciary responsibilities for these assets and for setting overall investment policy.

GIFTS WE
ACCEPT

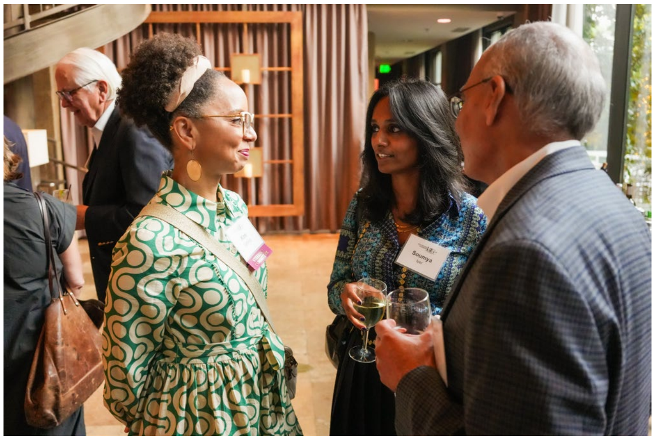
CFGG accepts a variety of assets as charitable contributions, including: cash, securities, bequests, beneficiary designation, life insurance, retirement plan assets, IRA Qualified Charitable Distributions, real estate, personal property, and cryptocurrency.

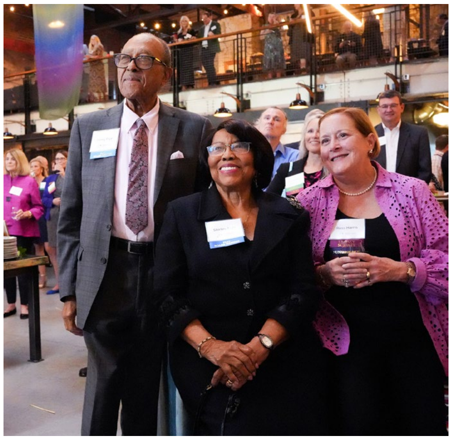
IRA QUALIFIED CHARITABLE DISTRIBUTIONS (QCDS)

The IRA Charitable Rollover provision allows individuals who have reached age 70 ½ to donate up to $111,000 (for 2026) per year to eligible charitable organizations directly from their Individual Retirement Account (IRA) without treating the distribution as taxable income. These gifts can be used to meet the donor's required minimum distribution. Individuals may exclude this income from their gross income on their Federal income tax return.

During a client's lifetime, gifts from their IRA can be given to many funds at CFGG, including community endowment funds, scholarship funds, organizational endowments, and field of interest funds. The IRS does not allow QCDs to be made to a Donor-Advised Fund. Contact us for a complete list of funds available.

It's easy to make an IRA rollover gift. You or the client may contact the IRA plan administrator to transfer their gift amount to CFGG (56-1380249), then contact our Development team at the Community Foundation to let us know which fund they would like to support.





TYPES OF FUNDS AT THE

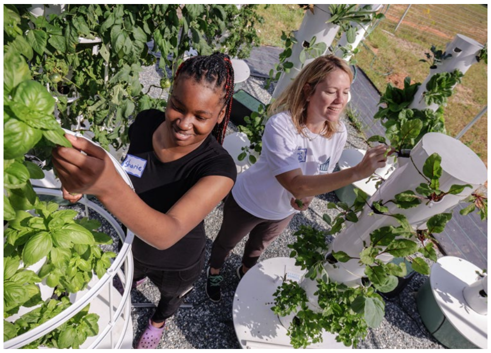
COMMUNITY FOUNDATION

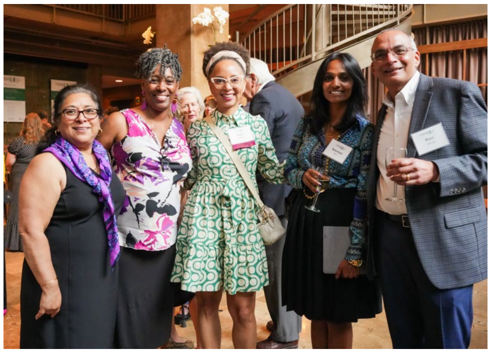
The Community Foundation of Greater Greensboro offers a wide variety of giving vehicles, making it easy for you to support your favorite organizations and causes during your lifetime and after. Here are some options to consider when working when clients:

Donor Advised Funds

Donor Advised Funds at CFGG offer the advantages of a private foundation without the set-up costs, ongoing excise taxes, and administrative expenses.

- Because CFGG is a public charity, your gift receives more advantageous tax treatment, as well as reduced expenses and burdens.
- You receive an immediate tax deduction whenever you add assets (cash or non-cash assets) and pay no tax on the fund's future earnings.
- You can let the fund grow until you are ready to recommend grants without being obligated to make a minimum distribution.
- You may manage your grantmaking online and access historical reports on gifts, grants, and performance of your fund.
- You may create a tradition of giving by naming future generations as successor advisors.
- You can continue your support in perpetuity if you choose to endow your fund.
- All administrative services, including financial reporting and regulatory compliance, are managed by the professional team at CFGG.





TYPES OF FUNDS AT THE COMMUNITY FOUNDATION

Special Interest Funds

Special Interest Funds allow you to support your favorite non-profit organization, school, or religious institution in perpetuity.

- This is an endowed fund – you are creating a permanent charitable legacy.
- The organization receives the benefit of endowed funds but isn't burdened with the management and record-keeping requirements.
- Your fund will be invested in our long-term investment pool, minimizing fund costs and improving efficiency; the fund's earnings will provide the grantmaking resources to the designated institution.
- You receive an immediate tax deduction on all your contributions, and the Community Foundation provides all necessary administrative and record-keeping services.
- If the beneficiary organization ceases to exist, loses its tax-exempt status, or changes its mission, the Community Foundation can redirect support for a purpose as close as possible to your original intentions.

Field of Interest Funds

Field of Interest Funds let you support your favorite cause or need in the community in perpetuity. You identify the area of focus and entrust the Community Foundation with the responsibility of selecting specific recipients of grants from your fund. By doing so, your gift is flexible enough to meet changing community needs.

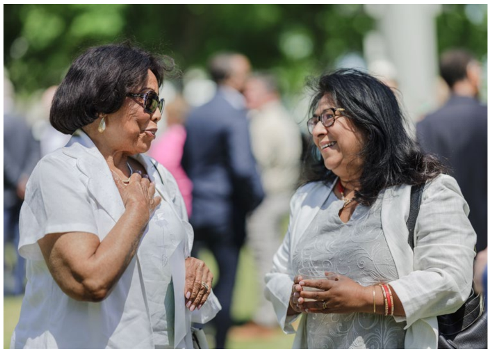
- This is an endowed fund – you are creating a permanent charitable legacy.
- Your fund will be invested in our long-term investment pool, minimizing fund costs and improving efficiency; the fund's earnings will provide the grantmaking resources.
- You receive an immediate tax deduction on all your contributions, and the Community Foundation provides all administrative and record-keeping services.
- You are able to tap the Community Foundation's expertise in program areas to make the most impactful grants to target your issue.

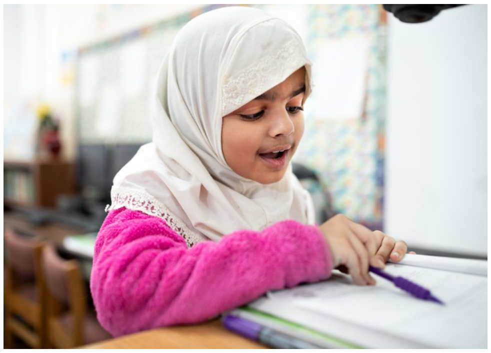
TYPES OF FUNDS AT THE
COMMUNITY FOUNDATION

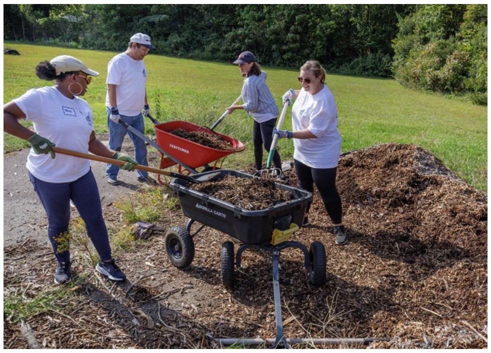
Community Focused Funds

Community Focused Funds give the Community Foundation the ability to take on forward-thinking projects as the needs arise across Greensboro.

- This is an endowed fund – you are creating a permanent, named charitable legacy.
- Your fund will be invested in our long-term investment pool, minimizing fund costs and improving efficiency; the fund's earnings will provide the grantmaking resources.
- The Community Foundation's staff and Board of Trustees have been at the forefront of addressing community needs through thoughtful, well-researched local initiatives; this type of fund provides a cornerstone for our civic leadership.
- You receive an immediate tax deduction on all your contributions and all necessary administrative and record-keeping services are handled by the Community Foundation.
- You join some of the most notable philanthropists in Greensboro as change agents for our community, and your giving will be magnified by the collective power of other unrestricted gifts, allowing the Community Foundation to leverage its impact.







LEGACY
SOCIETY

Legacy gifts to the Community Foundation of Greater Greensboro provide permanent funding to address needs in our community and demonstrate the value of charitable giving for generations. Best of all, legacy gifts aren't solely transferred through estates. We offer many options that your clients utilize right now, while they are here to help decide how the funds are used and to see the impact their gift makes on Greensboro.

Our Statement of Intent form is a non-legally binding document that your client completes with a member of the Development team at the Community Foundation that helps provide clarity on the intention of their gift. While the client works with their advisor or attorney to establish their legacy gift, they can revise their Statement of Intent form with our team as often as they like. Our team works with the client to provide a personalized experience as they make plans for the legacy they intend to leave.

Just some of the benefits of making a legacy gift to CFGG:

- Legacy gifts provide an excellent option if your client wants to support the community but cannot make an immediate, outright gift.
- Some options can help reduce their taxable estate and may help the client's heirs receive a larger inheritance.
- Other options allow your client to take a large charitable contribution deduction now, as well as recurring deductions each year.

Once they have completed their Statement of Intent form with the Community Foundation, the individual or family is considered a member of our Legacy Society. This special group is comprised of people who truly care about the Greater Greensboro community, and we want them to know how much we appreciate their generosity. Members of the Legacy Society will find their name listed on the Community Foundation website as well as in printed materials, such as our Annual Report. They receive invitations to Community Foundation events throughout the year along with their own Legacy Society focused celebration annually.

If you or your client are interested in leaving a lasting impact on our community, reach out to the Community Foundation to learn more about legacy giving opportunities. Our team is here to help you create a meaningful and enduring legacy for future generations.

PROFESSIONAL
ADVISORS LEADERSHIP

Our community of Professional Advisors provides valuable insight and partnership to the Community Foundation, for which we are immensely grateful. Together, we can help impact our community by supporting your clients and their philanthropic vision.

Committee

The Professional Advisors Committee is supported by the Development and Donor Engagement Department. Its mission is to encourage more charitable giving by individuals, families and organizations to the causes most important to them and to heighten awareness of the benefits of giving through the Foundation within the professional community of advisors. The Committee is led by a chair as appointed by the Board Chair.

Meet The Professional Advisors Committee:

Erin C. V. Bailey | Tuggle Duggins P.A.

Aaron Bennett | Carruthers & Roth

Mike Fisher | Diversified Trust Company

Keith Hiatt | Breslow, Starling, Frost, Warner & Boger

John Igharas | Piedmont Trust Company

Ron Johnson | Carruthers & Roth

Amy Kincaid | Schell Bray

Jennifer Koenig | Schell Bray

Ashley Madden (Chair) | GenCrest Capital Partner

Michael Mahoney | Northwestern Mutual

Martha Peddrick | Carruthers & Roth, *Retired*

Adam Tarleton | Brooks Pierce

PROFESSIONAL
ADVISORS LEADERSHIP

The Professional Advisors Network is a collection of expert professional advisors who are partnering with us to provide insight and advice on how to help philanthropists make an impact in Greensboro. The Network's members are asked to stay informed about CFGG initiatives and to share information that will assist their peers in effectively identifying and carrying out their clients' charitable planning needs.

Network

Meet The Professional Advisors Network:

Steven W. Arrington
The Arrington Firm, PC

Susan Beard, CRPC, CTFA | Regional Relationship Development Officer & Senior Wealth Advisor
Old North State Trust

Louise Maultsby Bristol | Special Counsel
Schell Bray

Ed Chaney | Member
Schell Bray

James Dean | CEO
JD Financial Group and Associates Inc.

Abby Donnelly | CEO Coach
The Leadership & Legacy Group

Deanne Ebel | SVP Trust and Wealth Advisor
Pinnacle Bank

Linda Erickson | Founder + Financial Advisor
Erickson Advisors

W. Scott Faircloth | Regional Managing Director
Truist Wealth

Sue Hunt | Owner
Focus Estate Solutions

Rosemary Ireland
Rosemary R. Ireland, CPA, PLLC

Kim Ketchum | Owner
Ketchum & Company

Phyllis G. Lancaster | Partner
Mission Wealth Management

Kristin Landrum
Tuggle Duggins, PA

Michael LoNano | President
LoNano Financial Advisors

Jennifer McCosley | Senior Wealth Advisor
Beacon Pointe

Davis McDonald | Special Counsel
Carruthers & Roth, P.A.

Ryan Newkirk | Partner
Granville Capital Inc.

Ted M. Oliver | Managing Director (Retired)
Davenport & Co. LLC

Erica G. Parker | Business Development Officer, VP
Fidelity Bank

Jerrold Pinsker
Pinsker Wealth Management, Inc.

Bob Plybon
Plybon & Associates

Ira Ross | Partner & Advisor
Spartan Planning Group

Joshua Scott, EA | Senior Tax Advisor
Joshua Scott Associates

Gosia Smulowitz | Managing Director
Selenza Generations

John (JT) Thomas | Managing Member
Stearns Financial Group

Chris Wagner | SVP
Morgan Stanley and Co.

Suzanne Wilcox, CPA, CFP | Principal
Diversified Trust Company

Joel Williamson | President
In His Hands Financial, LLC

Eric Wisco | Owner
Eric A. Wisco, C.P.A.,P.A.

PROFESSIONAL
ADVISORS LEADERSHIP

Honorary Circle

This Honorary Circle celebrates those whose leadership goes beyond business-it represents values, legacy, and purpose. Their guidance has helped shape not only the financial well-being of their clients but also the charitable impact they are able to make in our community and beyond.

Meet The Honorary Circle:

Janet Ward Black*

Principal | *Ward Black Law*

Jim N. Duggins, Jr.

Director | *Tuggle Duggins, PA*

Bob D. Hudson

Wealth Management Advisor | *Northwestern Mutual life Ins. Co.*

Buster R. Johnson, III

Principal | *Diversified Trust Company, Inc.*

Ron P. Johnson

Director | *Carruthers & Roth, PA*

Paul H. Livingston, Jr.

Member | *Schell Bray, PLLC*

Bill G. McNairy

Attorney | *Brooks Pierce*

Martha T. Peddrick

Retired Special Counsel | *Carruthers & Roth, PA*

Dennis Stearns, CFP

Founding Partner, Senior Wealth Advisor | Stearns Financial Services

** Deceased*

CONTACT

If you have questions or would like to request that our staff join you in discussions with your clients, contact us.

Cathy Knowles
Chief Philanthropy Officer
cknowles@cfgg.org
336.790.7798

Sarah Britt
Development Manager
sbritt@cfgg.org
336.790.7766

FORMS AND
RESOURCES

IRS Determination Letter

IRS Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077550279
Mar. 04, 2009 LTR 4168C 0
56-1380249 000000 00 000
00044094
BODC: TE

COMMUNITY FOUNDATION OF GREATER
GREENSBORO INC
330 S GREENE ST STE 100
GREENSBORO NC 27401-2659

021335

Employer Identification Number: 56-1380249
Person to Contact: Sophia Brown
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of Aug. 08, 2008, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in July 1984, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Cindy Westcott

Cindy Westcott
Manager, EO Determinations

W-9 Form

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Community Foundation of Greater Greensboro

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☑ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ ________

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) A

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
301 N. Elm St., Ste. 100

Requester's name and address (optional)

6 City, state, and ZIP code
Greensboro, NC 27401

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number
56 – 1380249

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ [signature] Date ▶ 5/17/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Statement of Intent Form

COMMUNITY FOUNDATION OF GREATER GREENSBORO

STATEMENT OF INTENT: ESTATE OR DEFERRED GIFT

As evidence of my/our desire to provide a legacy of support, I/we hereby inform The Community Foundation of Greater Greensboro (CFGG) that I/we have made provisions for a gift in my/our estate plans. I/we understand that this commitment can be modified by me/us at any time.

1. Type of Gift (check all that apply)

☐ Bequest in my/our will

☐ Life Insurance Policy Beneficiary Designation

☐ Charitable Trust (select one) ☐ Unitrust ☐ Annuity Trust ☐ Revocable Trust ☐ Lead Trust

☐ Charitable Gift Annuity ☐ Current ☐ Deferred

☐ IRA or Retirement Plan Beneficiary Designation

☐ Other (please describe) ____

2. Estimated Gift Value (optional)

With the understanding that values can change, I/we estimate the value of my/our gift to be approximately $______________________ in today's dollars. I/we understand that, by stating the amount, my/our estate is not legally bound by this statement, and I/we may choose to change or revoke this bequest at any time, based on my/our sole discretion.

3. Gift Designation

☐ This gift is unrestricted and may be used by CFGG where the need is greatest

☐ Please designate my/our gift for a designated purpose (please describe below):

____

____

____

4. Records

I/We wish for CFGG to hold a copy of the pages of our will that are relevant to our legacy gift (please check one)

☐ Yes ☐ Not at this time ☐ Not Applicable

The date of my/our current will is: ____________________

Professional Advisor contact name and firm:____

Professional Advisor phone number:____

I/We have provided and/or attached other relevant documentation to our legacy gift (please list documents below):

____

5. Gift Recognition

☐ I/We authorize The Community Foundation of Greater Greensboro to recognize me/us publicly as a member of our Legacy Society.

Please list our name(s) as:____

☐ I/We would like to remain anonymous

6. Contact Information

Name:_____________________ Spouse/Partner/Relative's Name:______________

Birthdate:_________________________ Birthdate:_____________________________

Email:____________________________ Email:______________________________

Phone:___________________________ Phone:______________________________

Address:____

City/State/Zip:____

____

Print Name:____

Signature:____ Date:____________________

Print Name: ____

Signature:____ Date:____________________

The information/records submitted with this form are a statement of intent reflecting my/our current wishes. I understand that my/our signature acknowledges that this document is a reflection of my current intent and is not binding.

This form was received by:

Name: _________________________ Date: __________________

This form was processed by:

Name: _________________________ Date: __________________

Thank you for supporting
The Community Foundation of Greater Greensboro!

Fee Schedule

COMMUNITY FOUNDATION OF GREATER GREENSBORO

Administrative Fee Schedule

Donor-Advised Endowment	
Fund minimum $25,000	
Up to $30,000	$300/yr.
$30,000 to $1 million	1.00%
$1 million - $5 million	0.75%
$5 million - $10 million	0.50%
$10 million	0.40%

Donor-Advised Non-endowed	
Fund minimum $10,000	
Up to $40,000	$500/yr.
$40,000 to $1 million	1.25%
$1 million - $5 million	1.00%
$5 million - $10 million	0.75%
$10 million	0.60%

Special Interest and Organization Endowments Special Purpose funds	
Fund minimum $25,000	
Up to $40,000	$300/yr.
$40,000 to $1 million	0.75%
$1 million - $5 million	0.50%
$5 million - $10 million	0.50%
$10 million	0.40%

Scholarships Permanent external selection	
Fund minimum $25,000	
Up to $40,000	$500/yr.
$40,000 to $1 million	1.25%
$1 million - $5 million	1.25%
$5 million - $10 million	1.25%
$10 million	1.25%

Field of Interest – administered via CF community grants process	
Fund minimum $25,000	
Up to $33,333	$500/yr.
$33,333 to $1 million	1.50%
$1 million - $5 million	1.25%
$5 million - $10 million	0.75%
$10 million	0.60%

Scholarships Permanent – internal selection and/or semi-managed by CF	
Fund minimum $25,000	
Up to $62,500	$1,250/yr.
$62,500 to $1 million	2.00%
$1 million - $5 million	2.00%
$5 million - $10 million	2.00%
$10 million	negotiable

Field of Interest Endowments – donor-specified grantmaking criteria	
Fund minimum $250,000	
Up to $500,000	$10,000/yr.
$500,000 to $1 million	2.00%
$1 million - $5 million	1.50%
$5 million - $10 million	1.00%
$10 million	0.80%

Scholarships Permanent – full management by CF	
Fund minimum $100,000	
Up to $200,000	$5,000/yr.
$200,000 to $1 million	2.50%
$1 million - $5 million	2.50%
$5 million - $10 million	2.50%
$10 million	negotiable

Rates are reduced by 50 basis points for endowed scholarships

Charitable Trusts	
Fund minimum $100,000	
Up to $1 million	1.00%
$1 million - $5 million	1.00%
$5 million - $10 million	1.00%
$10 million	0.80%

Supporting Organizations	
Fund minimum $1 million	
Up to $1 million	n/a
$1 million - $1.5 million	$25,000/yr.
$1.5 million - $5 million	1.75%
$5 million - $10 million	1.20%
$10 million	1.00%

The Community Foundation will serve as trustee for trusts with an irrevocable 50% minimum remainder interest to Community Foundation permanent funds, including 10% to unrestricted. If 100% of remainder interest benefits Foundation permanent funds, including 10% to unrestricted, rates are reduced by 15 basis points; if 100% remainder interest benefits unrestricted fund, rates are reduced by 50 basis points.

Revolving Loan Funds	
Fund minimum $100,000	
Up to $50,000	$1,000/yr.
$50,000 to $1 million	2.00%
$1 million - $5 million	2.00%
$5 million - $10 million	2.00%
$10 million	2.00%

Charitable Gift Annuity	
Fund minimum $25,000	
Up to $66,667	$500/yr.
$66,667 to $1 million	0.75%
$1 million - $5 million	0.75%
$5 million - $10 million	0.75%
$10 million	0.60%

Charitable Purpose Funds

No fund minimum

Fixed fee $500 year 1

Fixed fee $1000 year 2 (if approved for renewal)

Plus 2% of incoming funds

Support Services for Private Foundations

Please contact us for fees tailored to your specific needs.

All rates are applied in a tiered manner (unless otherwise noted) on an annual basis. Investment expenses are charged to each fund in addition to the costs above. Effective: 6.23.22

Grow the Way You Give Workbook

GROW THE WAY YOU GIVE

A Strategic Approach to Personal Philanthropy

COMMUNITY FOUNDATION
OF GREATER
GREENSBORO

COMMUNITY FOUNDATION OF GREATER GREENSBORO

OUR MISSION

Let's create lasting impact in our community.

The Community Foundation of Greater Greensboro inspires giving, maximizes opportunities, and strengthens communities for present and future generations.

01

Start Your Journey

Learn about the benefits of planned giving.

02

Identify Your Values

Delve into the motivations behind your philanthropy.

03

Focus Your Giving

Choose the causes that best fit your values.

04

Create Your Plan

Plan your giving to create the legacy you want to leave.

05

Your Philanthropic Partners

Learn the benefits of partnering with the Community Foundation of Greater Greensboro.

01 START YOUR JOURNEY

Do you plan your philanthropy?

While most people take the time to plan their annual budgets and consider how their assets will be divided up at death, very few sit down to consider how they want to give money away, whether during life or after.

We want to change that. The Community Foundation of Greater Greensboro's mission is to inspire giving, maximize opportunities, and strengthen communities for present and future generations. We exist, literally, to work with donors from across this great city to make Greensboro an even better place.

We think everyone - regardless of income, regardless of net worth - should have a personal giving plan, and we have created this planner to help you start your own journey.

To get started, using the chart below, consider the organizations that received your top five largest cumulative gifts in the last year. You can include the total dollar amounts or just rank them from 1 to 5, largest to smallest. Next, check the boxes that correspond to the reasons why the donations were made. If there is more than one reason, check all that apply. If you volunteered your time, indicate that as well.

Was the gift . . .

Friend Driven - Donations made to an organization because a friend made a personal request, such as asking you to an event or fundraiser

Impulse Driven - Unplanned donations to address immediate needs such as natural disasters or something you saw on the news

Life Driven - Donations made to organizations that are part of your daily life - place of worship, your alma mater, your child's school

Mission Driven - Donations to organizations that align with your personal values and interests

	Total $ or Rank	Organization	Friend Driven	Impulse Driven	Life Driven	Mission Driven	Volunteer Hours
1							
2							
3							
4							
5							

02 IDENTIFY YOUR VALUES

Our lives and experiences shape our personal values, revealing what is most important to us. Values can be rooted in faith, tradition, career, or personal interests. This exercise will help you identify the most important values to consider as you give. We've listed a few to get you started. Feel free to add any not listed here. Choose your top 10, then narrow your list to five, and finally select your top three.

Adventure
Balance
Challenge
Collaboration
Community
Compassion
Competence
Courage
Creativity
Curiosity
Dignity
Diversity
Education
Empowerment
Entrepreneurship
Equity
Excellence
Fairness
Faith
Family

Forgiveness
Freedom
Friends
Happiness
Harmony
Honesty
Humility
Impact
Inclusion
Independence
Innovation
Integrity
Kindness
Knowledge
Leadership
Legacy
Openness
Opportunity
Personal Experience
Power

Prosperity
Resilience
Respect
Responsibility
Risk-taking
Security
Self-reliance
Self-respect
Service
Simplicity
Social Justice
Social Responsibility
Success
Sustainability
Tolerance
Transparency
Trust
Wealth
____
____

TOP 10

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________
7. ____________________
8. ____________________
9. ____________________
10. ____________________

TOP 5

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________

TOP 3

1. ____________________
2. ____________________
3. ____________________

Why are you motivated by these three values? ____________________

____

Was it difficult to narrow down your choices? If so, why? ________________

____

____

____

____

03 FOCUS YOUR GIVING

Given so many issues and needs, it can be challenging to identify a focus for your philanthropy. A community's health can generally be tied to how well it addresses issues in the eight categories we've listed below. These categories provide a framework for your overall giving strategy, whether you give locally, nationally, or internationally. Feel free to add your own. Choose your top five, then narrow your list to three.

Basic Needs
- Affordable Housing
- Food Insecurity
- Homelessness
- Poverty Alleviation
- Social Justice/Civil Rights

Health and Wellness
- Access to Affordable Health Care
- Adoption/Foster Care Services
- Animal Welfare/Companionship
- Disabilities
- Domestic Support Services
- Domestic Violence/ Sexual Assault
- Medical Research
- Mental Health
- Preventative Care/Wellness
- Seniors/Long-term Care
- Substance Abuse
- Veteran Issues

Arts and Culture
- Access & Participation
- Arts & Music Education
- Helping the Arts Flourish
- Historic Preservation
- Performing Arts
- Public Media, Radio/Television
- Visual Arts

Thriving Economies
- Economic Development
- Economic Resilience
- Gender Wage Gap
- Small Business/Entrepreneurship
- Workforce Development

Education
- Adult Basic Education
- Continuing Education
- Early Learning
- English Language Learners
- Higher Education
- Libraries
- Literacy
- Youth programs

Vibrant Communities
- Civic Education/Engagement
- Community Building
- Community Revitalization
- Equity
- Faith Communities/ Interfaith Collaboration
- Immigrants & Refugees
- Parks & Open Spaces
- Policy & System Change
- Public Safety
- Social Support

Global Issues
- Clean Water/Sanitation
- Disaster Relief/Recovery
- Disease Eradication/Vaccines
- Economic Opportunity
- Education
- Empowering Women/Girls
- Food Insecurity
- Gender-based Violence
- Health
- Infant Mortality
- Land Rights
- Leadership/Advocacy/Social Change
- Pollution
- Poverty Alleviation

The Environment
- Climate Justice
- Endangered/Threatened Species
- Environmental Education/Advocacy
- Environmental Protection
- Sustainable Agriculture/ Development/Transportation
- Wildlife Conservation/ Protection

TOP 5

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________

TOP 3

1. ______________________
2. ______________________
3. ______________________

04 CREATE YOUR PLAN

What impact do you want to have on the issues you are most passionate about? Consider these three primary strategies for creating change.

RELIEF

Provides direct services to those requiring immediate help.

PREVENTION

Identifies causes and proactively offers services and support to avoid the need for services in the future.

REFORM

Efforts to advocate for improvements in current systems, laws, and policies.

RESULTS

Once you understand what drives your philanthropy, the next step is developing a plan that ensures your charitable giving is in line with your values, interests, and desire for impact. After completing this exercise, many people find they haven't been as focused as they would like - targeting their giving to the things they care about the most.

Which strategy resonates with you? Which strategy has been the focus of your past philanthropy? Does this exercise make you consider altering your future giving?

05 YOUR PHILANTHROPIC PARTNERS

The professionals at the **Community Foundation of Greater Greensboro** (cfgg.org) can help you plan and find the best fit for your philanthropy. A trusted philanthropic advisor to over 700 fundholders in the greater Greensboro region, we work hand-in-hand with donors and their professional advisors. Because we have been serving the community since 1983, we have a deep understanding of community needs and the nonprofits that strive to meet them. We hope you will reach out to learn more about how we can help you with your philanthropic goals. Here are just some of the ideas to get you started:

Learn more about the issues and needs in our community

- Explore our partnerships with the Guilford Nonprofit Consortium and other nonprofits to learn more about the over 700 nonprofits already at work.
- Schedule a one-on-one conversation with one of us to discover opportunities to match the issues and needs that are important to you with nonprofits and other philanthropists in our community.

Use tax-efficient giving techniques

- Receive the latest information regarding donor advised funds to maximize the tax benefits of your charitable gifts.
- Easily and sfficiently donate appreciated assets to the nonprofits that you want to support.
- Consider using IRA Required Minimum Distributions as Qualified Charitable Distributions.

NOTES:

Create your own legacy plan

- Design a plan for your philanthropy that will continue in perpetuity, giving the Community Foundation instructions on how to support your favorite causes or even wherever the needs are the greatest year-to-year.
- Go deeper into learning more about initiatives that address strategic areas of interest, including housing, equity, women's issues, education, and more.
- Endo your annual giving to specific programs or charities.

COMMUNITY FOUNDATION OF GREATER GREENSBORO

cfgg.org