

SERVICES FOR FUNDHOLDERS

When you become part of Central Carolina Community Foundation, you gain access to a powerful resource that includes our full complement of services. We strive to provide you with the information you need so that you can give more confidently and with greater impact. Here, you will find a dedicated and passionate staff with a wealth of knowledge and experience at your disposal. Our services are not prepackaged — we tailor our help to your unique charitable goals and can offer as much or as little guidance as you desire.

Philanthropic Advisement

As a donor, you will be assigned a personal account manager who can provide individualized service to help you navigate the Foundation and connect with the staff members who can:

- Provide your fund balance and grant history.
- Research potential grantees in your interest areas.
- Connect you to tools and resources about charitable giving and estate planning.
- Provide instructions for adding to your fund.
- Update your contact information.
- Assist you with grant requests.
- Act as a liaison between you and a grantee.
- Offer assistance as needed.

Community Expertise

We provide extensive knowledge about the most critical issues facing our community, as well as educate donors on ways in which these issues can be effectively addressed. Our expertise comes from our own leadership within the community on projects that we see as integral to the community's development. In 2013, the Foundation, together with our donors, awarded \$13.1 million in grants across the nation.

Because of our close relationship with the communities we serve, we are an excellent resource for up-to-date information about current and emerging needs, and how donors can best give to those needs. Read up on our latest projects in our publications and newsletters, or contact your personal account manager to request information about a specific issue you are interested in.

Donor Engagement

We offer a wide variety of opportunities to further engage our donors and to help donors form connections with causes, nonprofits and each other.

- Invitations to educational and donor appreciation events.
- Access to our publications, created to inform donors, nonprofits and the general public about relevant issues. These can be sent to you via our digital mailing list or in hard copy.
- Unique services centered on engaging families and children in philanthropy.

Fund Administration and Reporting

Because we want you to focus on the important things — your vision for your philanthropy and the impact you want to make — we take care of the administrative work and record-keeping including the following:

- Providing acknowledgment of contributions to your fund to serve as your receipt for tax purposes.
- Mailing all approved grants directly to your nonprofit, with a letter listing you (unless you choose to remain anonymous) as the recommender of the gift.
- Providing, if applicable, IRS form 8283 for your gifts on non-publicly traded securities and real estate (must be filed with your tax return, if applicable).
- Conducting due diligence on nonprofit organizations. When you would like to make a grant to an organization we have not worked with previously, we contact the organization to verify nonprofit status and ensure that its purpose remains consistent with Community Foundation guidelines.
- Providing information and research on any organizations you would like to know more about before making a grant (upon request).
- Directors insurance.
- Providing quarterly fund statements (see Sample Fund Statement) listing gifts, grants, fees, interests and gains on your investments.

Investment Management

All funds at Central Carolina Community Foundation benefit from professional investment management. We currently manage in excess of \$100 million in assets for the benefit of the community. For more information, please see the copy of our investment policy included in this guide or contact our VP for Finance, Jenni Meyer, CPA, at jenni@yourfoundation.org.