

## CCCF MANAGES ENDOWED CHARITABLE LEGACY FUNDS

- Gift processing, posting
- Gift deposits
- Grant & program disbursements
- Investment manager fee posting
- Fund reconciliation / rectification transfers
- Pledge reminders
- Fund accounting report generation

### ACCOUNTING



- Investment policy formulation
- Investment manager: select, monitor, hire, fire
- Asset & sub-asset allocation
- Long-term & short-term policy ranges
- Pooled invested assets w/separate accounting
- Investment return postings
- Tracking, benchmarking, best practices

### INVESTMENT



- Contribution receipts for IRS compliance
  - Annual audit
  - Annual IRS 990 filing
  - Annual PA BCO filing

### COMPLIANCE



## CCCF **GROWS** ENDOWED CHARITABLE LEGACY FUNDS

### Individual & Family Legacy Philanthropy Suite of Services



### Nonprofit Endowment-Building Suite of Services



## INDIVIDUAL & FAMILY PHILANTHROPY SUITE OF SERVICES

### PHILANTHROPIC PLANNING & GRANTMAKING SERVICES

CCCF Philanthropic Advisor assigned to relationship

Grant proposals online for review

No geographic limitations on grants within United States

Grant processing & due diligence

Philanthropic strategy sessions & family meetings

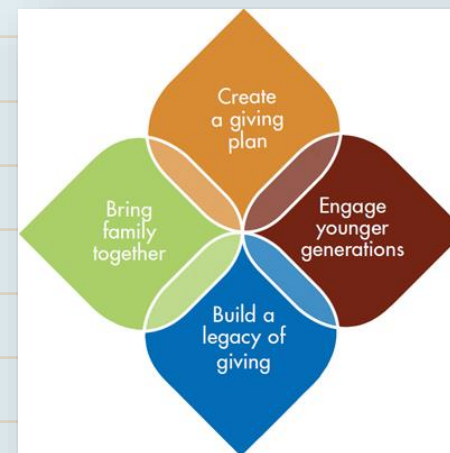
Create mission, values & philanthropic legacy statements

Customized grant proposals within specified areas of interest

Assistance soliciting, reviewing and evaluating grant proposals

Due Diligence/Smart Grantmaking Process

Grant award check & correspondence



### INFORMATION & EDUCATION SERVICES

Donor Education Series / Smart Giving Series / Behind the Scenes Tours / Giving Circles

Access to program staff expertise

Personal customized site visits

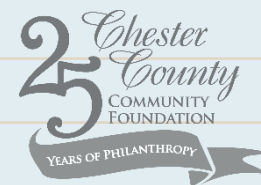
Customized reports on specific nonprofit or broad field of interest

### LEGACY SERVICES

Deferred gift strategies

Unlimited successor advisors

Customized training for next generation



## #7 PLANNED GIFT ADMINISTRATION

- **Bequest** language
- **IRA** acquisition and fund administration
- **Charitable Gift Annuities** projections and calculations of income that beneficiaries can expect; contracting; payouts
- **Charitable Remainder Trusts** or **Charitable Lead Trusts** acquisition and fund administration
- **Life insurance** gift processing
- **Real estate** gift processing

## #6 HELP IMPLEMENT

- **Planned Giving case statement & materials** review & feedback
- **Prospect research rating**
- **Professional advisor outreach**
- **Speakers:** planned giving/leave a legacy motivation, values, options, opportunities
- **Cultivation planning**
- **1:1 meeting practice**
- **Meeting follow up**
- **Planned gift stewardship**

## #5 CAPACITY BUILDING GRANTS

- **CCCF Fund for Chester County grants** to strengthen nonprofit capacity (planning, fundraising, management, governance, etc.)

## #1 EVALUATE & PLAN

- **Assess organizational readiness** for planned giving & endowment building
- **Create CCCF NPO Endowed Fund** when ready
- **Planned giving framework:** endowment building & planned giving goals, process, prospect research, timelines
- **Annual check-in meeting** with Board & senior staff

## #2 PUBLICITY

- **Nonprofit Endowment at CCCF**
- **CCCF annual report** listing
- **CCCF web site listing**, with dedicated Endowment Fund page & donation link
- **Brochure:** initial draft + 100 color copies
- **Electronic ads** promoting planned gifts, to insert on npo website & newsletter
- **Site visit** priority candidate for tours

## #3 TRAINING

- **Attracting Endowed & Planned Gifts:** capacity building workshops...monthly
- **Peer Learning Circles** for nonprofit staff & board members ...quarterly
- **Pro Legacy Advisor Network** forums
- **Board of Trustees Institute:** meet, greet, network & learn...annually each autumn
- **Online resources...**'best of' links @ [www.chescocf.org](http://www.chescocf.org) Resources
- **Delaware Valley training...**Planned Giving Day, Partnership for Planned Giving, LaSalle Nonprofit Center, AFP @ [www.chescocf.org](http://www.chescocf.org) Resources

## #4 COACHING/CONSULTING

- **1:1 coaching** by Community Foundation staff
- **Nonprofit Resource Expo:** meet, greet & sample trainers & consultants...annually each June
- **Chester County Consultants Collaborative & other consultants...**[www.chescocf.org](http://www.chescocf.org) Resources page

