

## 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



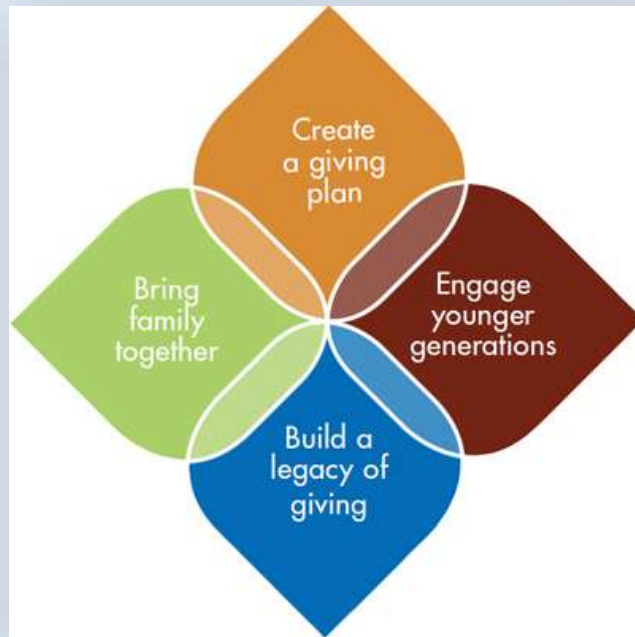
- Contribution receipts for IRS compliance
  - Annual audit
  - Annual IRS 990 filing
  - Annual PA BCO filing

### COMPLIANCE



# CCCF **GROWS** ENDOWED CHARITABLE LEGACY FUNDS

## Individual & Family Legacy Philanthropy Suite of Services



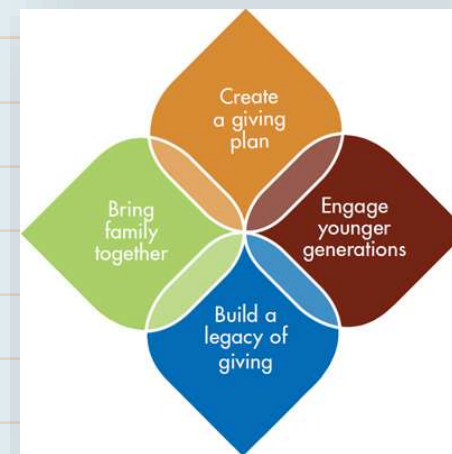
## Nonprofit Endowment-Building Suite of Services



# 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 Remainder Trusts** or **Charitable Lead Trusts** acquisition and fund administration
- **Life insurance** gift processing
- **Real estate** gift processing

## #6 HELP IMPLEMENT PLANNED

### GIVING OUTREACH (LOW KEY, LONG TERM)

- **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 ASSESS. CREATE WHEN READY

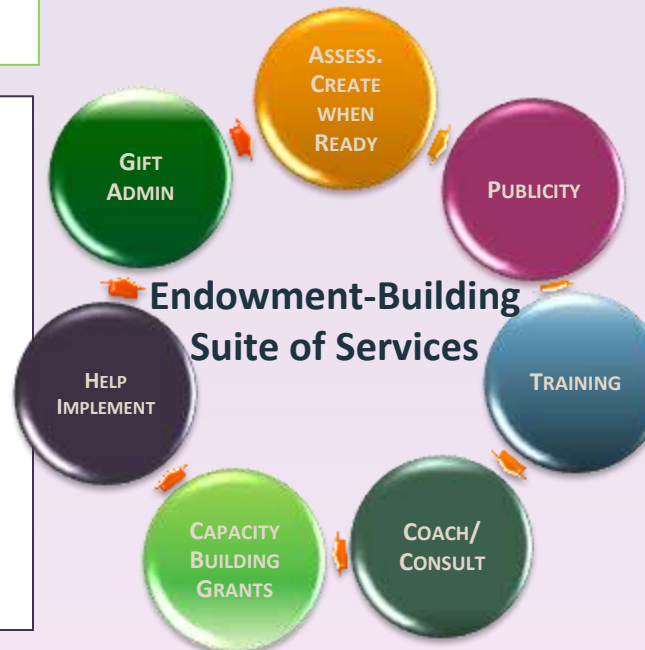
- **Assess organizational readiness** for planned giving & endowment building
- **Planned giving framework:** endowment building & planned giving goals, process, prospect research, long term timelines
- **Create CCCF Endowed Fund** when ready

## #2 PUBLICITY

- **Nonprofit Endowment at CCCF**
- **CCCF annual report** listing
- **CCCF web site listing**, with dedicated Endowment Fund page & donation link
- **Brochure:** initial draft w/planned giving, major giving, legacy society & endowed fund terminology. Suggested graphics.

## #3 TRAINING

- **Attracting Endowed & Planned Gifts:** capacity building workshops
- **Planned Gift 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
- **Regional Forums...**Planned Giving Day, Partnership for Planned Giving, AFP @ [www.chescocf.org](http://www.chescocf.org) Resources



## #4 COACHING/CONSULTING

- **1:1 coaching** by Community Foundation staff
- **Chester County Consultants Collaborative & other consultants...**[www.chescocf.org](http://www.chescocf.org) Resources