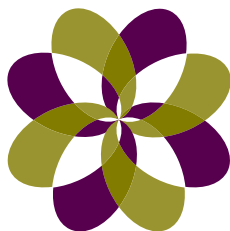




Invest. Ignite. Impact.



Stanislaus
Community
Foundation



Who We Are

Since 2002, Stanislaus Community Foundation has been a catalyst to transform local resources into common good. As a 501(c)(3) charitable organization, we offer a simple, personal approach that provides donors with the greatest opportunity to make a lasting impact. Anyone with a charitable goal can achieve it – easily and efficiently – by utilizing our services.

Stanislaus Community Foundation is comprised of more than 140 individual funds created by families, individuals, corporations and nonprofit organizations. Each one of our funds has its own charitable purpose and its own personality; we pool and invest those assets to build long-term economic stability and advance Stanislaus County. Since our inception, we’ve provided more than \$15 million in grants and scholarships within our region.

What We Do

- **Philanthropic Expertise** We help individuals and families achieve their charitable goals by offering tools and resources that make giving easy, flexible and effective. Our knowledge of local issues and needs makes your giving as impactful as possible.
- **Grantmaking** We actively foster generosity throughout Stanislaus County and support high-impact opportunities. Working in partnership with local agencies, we bring funding and resources to the community in the form of grants and scholarships.
- **Community Leadership** Recognizing that no single organization can achieve large-scale outcomes alone, we convene and engage a cross-section of organizations and individuals to benefit the community.
- **Investment Proficiency** Due to our asset size, we’re able to work with leading investment firms at a much lower rate than most managed funds. Our assets are broadly diversified and monitored by a local Finance Investment Committee, which includes many of our region’s finest financial minds.



Stanislaus Community Foundation is an accredited member of the Council on Foundations and meets all National Standards.

How to Start a Fund

The Process



Once you establish your fund, you may:

- Add money to the fund at any time, in any dollar amount.
- Utilize our online system to manage your account.
- Specify how grant disbursements should be acknowledged. You may make grants using your fund name or you may remain anonymous.
- Make grants to any nonprofit organization in the United States.

Types of Funds



Invest.
Ignite.
Impact.

*Think
Broadly*

*Stay
Involved*

*Address
Issues*

*Expand
Student
Access*

*Targeted,
Ongoing
Support*

*Grow the
Mission*

Unrestricted Funds

Offers the broadest giving option, allowing Stanislaus Community Foundation to provide grants where community need – and impact – is greatest.

Donor Advised Funds

Allows donors to make a charitable contribution, receive an immediate tax benefit, and then recommend grants over time. An excellent alternative to private foundations.

Field of Interest Funds

Target a favorite cause or issue without having to name a specific charity. You decide the purpose of the fund and we identify projects and organizations to impact your interests over time.

Scholarship Funds

Support students as they pursue their academic dreams. As a donor, you may define guidelines for student candidacy and the amount of the scholarship.

Designated Funds

Direct your gift to a specific nonprofit or multiple organizations. You identify the recipients you wish to benefit from your fund, our staff manages the ongoing distribution.

Agency Funds

Established by nonprofit and public agencies. We manage administrative and investment responsibilities; freeing the organization to pursue its charitable mission.



“Working with Stanislaus Community Foundation assures the desired tax result of a gift to a public charity, but leaves our clients with flexibility for them or their family to determine the ultimate use of their fund.”

LOU FRIEDMAN
Attorney, Gianelli Nielsen

We Provide Solutions

Stanislaus Community Foundation offers multiple giving options and can accept a variety of assets, including cash, stock, real estate, LLC shares, bequests and retirement plans, among others. We are also experts in complex gifts and can serve as a valuable resource in the following:

- ◆ Estate Planning
- ◆ Year-End Giving
- ◆ Charitable Gift Annuities
- ◆ Required Minimum Distributions (RMDs)
- ◆ Appreciated Assets
- ◆ Transfer of Wealth Conversations

Donor Advised Funds: PERSONAL

WHAT IS A DONOR ADVISED FUND?

Our most popular and fastest-growing fund type, a Donor Advised Fund allows you to easily support the issues and organizations you care about. You can establish a fund easily and efficiently at Stanislaus Community Foundation using cash, stock or other assets. Then, recommend grants to nonprofit organizations of your choice in Stanislaus County and elsewhere. Grants will be made in the name of your fund, or – if you choose – anonymously. You can claim a charitable tax deduction in the year a gift is made to your fund.



ADVANTAGES TO A DONOR ADVISED FUND

- **Personal** You can recommend grants to your favorite charities, wherever they are located, at the time of your choosing. An excellent alternative to establishing a private foundation.
- **Flexible** You can add to the fund at any time of your choosing and receive full tax benefits. Stanislaus Community Foundation can accept donations of almost any asset, including stock, crops and property.
- **Effective** You receive the maximum tax benefit at the time your contribution to your Donor Advised Fund is made, while retaining the grantmaking privilege for years to come.
- **Efficient** You can easily recommend grants to our staff electronically. Plus, Stanislaus Community Foundation takes care of all administrative tasks, so you can focus on your giving.
- **Fast** Donor Advised Funds can be set up in a matter of hours.
- **Informed** Stanislaus Community Foundation program staff is available to help you learn more about nonprofit organizations that meet your charitable goals.
- **Family** You can involve your family at any time and allow them to make grants from the fund in the future.

POWERFUL GIVING

KEY FACTS

- Minimum gift to establish a Donor Advised Fund is \$10,000.
- There is no additional fee to establish the Fund, and the nominal administrative fee is inclusive of investment oversight and grantmaking support.
- Funds may be endowed – ensuring grants are made in perpetuity – or expendable, which enables you to make grants of any size at any time.
- Distributions can only be made to qualified nonprofit organizations.

DONOR ADVISED FUND QUALIFICATIONS

- The IRS prohibits payments to any individual from a Donor Advised Fund.
- Donor Advised Funds cannot be used to grant an individual student a scholarship.
- No expenses – not even for a fundraising events – can be paid from a Donor Advised Fund.



“Starting our family’s Donor Advised Fund was a simple process that took less than an hour. The Foundation’s staff is always available to answer any questions we may have and they’re also very knowledgeable about what’s happening throughout the county’s charitable sector. Getting involved and opening a fund has shifted the way we think about philanthropy and the long-term impact we can have and the legacy we can leave in our beloved community.”

LYNN DICKERSON
Dickerson Family Foundation Fund

Scholarship Funds: INVESTING IN THE FUTURE

WHAT IS A SCHOLARSHIP FUND?

Whether established to honor or memorialize a loved one, to recognize a specific academic institution or to support a particular field of study, Scholarship Funds at Stanislaus Community Foundation provide essential benefits to students that will positively impact our community for years to come.

We use an online process to collect and evaluate student applications, and criteria for scholarship funds vary based on donor interests and intent. Scholarships are evaluated and selected by Stanislaus Community Foundation's scholarship committee, which is comprised of Board members, retired educators and community leaders.

HOW TO ESTABLISH A SCHOLARSHIP FUND

First, determine the name of the fund and specify its purpose. Some considerations include:

- ◆ Financial Need
- ◆ Field of Interest or Study
- ◆ Academic Requirements
- ◆ Athletic Achievements
- ◆ Key Activities
- ◆ Leadership Initiatives

Next, complete a simple fund agreement and activate your fund with an initial contribution.

KEY FACTS

- Minimum gift to establish a Scholarship Fund is \$25,000.
- There is no additional fee to establish the Fund, and the nominal administrative fee is inclusive of investment oversight and grantmaking support.
- Funds may be endowed – ensuring grants are made in perpetuity – or expendable, which enables you to make grants of any size at any time.

SCHOLARSHIP FUND QUALIFICATIONS

- No expenses – not even for fundraising events – can be paid from a Scholarship Fund.



ADVANTAGES TO A SCHOLARSHIP FUND

MAXIMUM TAX DEDUCTION

By creating a Scholarship Fund, you'll enjoy the most favorable treatment from the IRS.

FLEXIBILITY We recognize that Scholarship Funds are not "one size fits all." We work with you to ensure your intentions and wishes are executed.

ESTABLISH A LEGACY Each one of our funds is listed in our annual reports, on our website and on each grant check issued to an educational institution. Recognition of your legacy is always assured.

EASE Our staff works with local school districts to promote each scholarship, manage the application system, communicate with students and distribute awards. We truly handle the process from start to finish.



"I am very grateful to have received the Gemperle Family Farm Scholarship through Stanislaus Community Foundation. I'll be attending Stanislaus State and am planning to obtain a bachelor's degree in criminal justice. I also hope to attend graduate school to expand both my knowledge and experience."

– JULIA MARIE CORREA
2018 Scholarship Recipient

Corporate Advised Funds

WHAT IS A CORPORATE ADVISED FUND?

Corporate Advised Funds – in essence – are Donor Advised Funds (see page 5) for companies and organizations. Stanislaus Community Foundation offers a customized corporate philanthropy program for businesses and their employees. Your organization can outsource its entire charitable-giving program, or just a portion, for expert management and maximum impact. Corporate Advised Funds are an excellent alternative to creating a private foundation.

A branded Corporate Advised Fund allows your business to embrace strategic giving and community engagement as part of your overall company philosophy.



“Stanislaus Community Foundation has assisted with our Make Dreams Real Endowment Fund by helping us remain compliant and managing the administration of our fund. The Foundation has also helped streamline our fund’s grant process. I appreciate how they help make giving easy and flexible for us.”

DALE BOYETT

President, Boyett Petroleum Fundholder, Make Dreams Real Endowment Fund

ADVANTAGES TO A CORPORATE ADVISED FUND

SIMPLICITY Setting up a Corporate Advised Fund is easy, plus you can monitor your account and recommend grants online. Also, there are no separate tax filings or other accounting matters required after your fund is established. We help streamline your overall charitable-giving process.

PHILANTHROPIC EXPERTISE Your organization will have access to the Foundation’s professional grant making and administrative staff when deciding on how to best accomplish your philanthropic goals. This includes opportunities for co-funding projects with the Foundation. Together, we can help maximize your philanthropic impact with strategies that work best for you and your vision.

BUILD YOUR BRAND Utilize your fund to make a difference to the charities that matter to your business. Investments in community projects make wonderful public relations opportunities, and also ensure your company will leave a lasting legacy in Stanislaus County.

MAXIMUM CHARITABLE TAX DEDUCTION Stanislaus Community Foundation is a public 501(c)(3) charity, which means the initial gift to establish your fund – and all subsequent contributions into your fund – receive the maximum tax benefits allowed by law. In addition to cash, we can accept gift of securities, real estate, LLC shares and other properties that may be subject to capital-gains tax.

Agency Funds: Grow Your Mission



“Partnering with the Stanislaus Community Foundation was an easy choice as their mission aligns with our own. Like Community Hospice, the Foundation is dedicated to making a positive measurable change in our community and are invested in enhancing quality of life for the residents of Stanislaus County.”

– C. DESHA MCLEOD
President & CEO, Community Hospice



WHAT IS AN AGENCY FUND?

Many nonprofit and public agencies choose Stanislaus Community Foundation as a partner to house their charitable funds. The Foundation manages both investments and fund administration, providing agencies the freedom to focus and grow their own mission.

AGENCY FUND FAQs

HOW DO I START AN AGENCY FUND?

A minimum of \$10,000 is required to begin a fund. Our fund agreement is a simple document that outlines our relationship and requires at least two signees from your organization.

WHAT IS THE COST TO MY AGENCY?

We charge an annual minimal administrative fee based on assets. The fee supports ongoing administration of charitable funds.

WHEN CAN WE WITHDRAW DISTRIBUTIONS FROM THE FUND?

You may choose to receive distributions from your agency funds as often as you'd like – or not at all. No annual distributions are required.



“UCP of Stanislaus County believes in the benefit of collaboration. Building strong community connections adds value to the services UCP provides the developmentally disabled population in Stanislaus County. This is a relationship over the long-term, that will add tremendous value not only monetarily but also through building positive and impactful relationships.”

– KEENON KRICK
Executive Director, United Cerebral Palsy of Stanislaus County

Modesto
Graffiti



FASM
FASM.NET

WELLS
FARGO



PeerRecoveryArtProject

● **Vision**

Stanislaus is a Community of Choice
Where People Live, Work & Thrive

● **Mission**

Stanislaus Community Foundation
stewards charitable resources & nurtures
partnerships to advance the common good

● **Roles**

BUILDER

Build Culture of
Philanthropy

CONNECTOR

Connect Donors to
Causes & Leaders
to Opportunities

LEADER

Lead Alignment
Across Sectors
and Systems

● **Values**

- * Community Through Collaboration
- * Impactful Charitable Legacies
- * Lens of Abundance
- * Joy to Work With
- * Inclusive Leadership
- * Bold Systems Thinking

