



## If giving is one of the family values you want to pass along, we can help.

The Solano Community Foundation helps donors receive immediate tax benefits and allows them to stay involved in recommending grants that are made possible by their fund.

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**Personal involvement.** When you make a gift of cash, appreciated stock, or other assets to Solano Community Foundation, we can establish a Donor Advised or Endowment Fund in your family's name. Family members of all ages can then work with our professional staff to suggest ongoing uses for your fund — targeting the issues you care about most.

**Lasting connections.** Grant awards are issued to charities in the name of your fund. It's a simple, powerful, and highly personal approach that helps your family members stay connected to the community... and to each other.

**Permanent Named (endowed) Funds.** Also called “endowments,” Permanent Named Funds bear the name of an individual, family, or business and create a legacy for the donor in perpetuity. Often, an endowed fund is established to recognize and honor a person such as a mentor or a deceased family member.

Endowed funds are invested to provide income in perpetuity. Each year a portion of the income generated from the principal is used for the specific purpose for which the fund was established.

These funds are permanent, charitable assets dedicated to meeting the changing needs of Solano County. If desired, a donor can fund an endowment over a period of years.



For good. For ever. For Solano County.

## Giving back and staying involved

Meeting a variety of personal charitable interests.



### Benefits of establishing an Endowment Fund at the Solano Community Foundation

#### For the Donor:

- The donor will have a named legacy in perpetuity. Often these endowments are established as memorial donations or in honor of a special occasion.
- The donor will have as much of an active role as desired in the allocation of grant funds. Grants from the fund's revenue are distributed on an annual or semi-annual basis to any non-profit organization(s) specified when the endowment is established.
- The donor is able to make a positive impact on changing community needs.
- The donor receives a maximum tax advantage from the gift.

#### For the Community:

- The beneficiary organizations can depend on donations from the donor, on a yearly basis.
- The needs of the community are addressed through the donor's generosity, both during life and in perpetuity.

#### For the Solano Community Foundation:

- By being faithful to the donor's wishes, the Foundation will have access to funds for research and development with local expertise.
- The Foundation will have permanent, predictable fee revenue.
- The Foundation will have the flexibility to make grants and secure operations, improving the quality of life for the whole community.
- The Foundation develops the ability to more broadly affect positive change through increased visibility and cultivation of additional donors.

The Solano Community Foundation provides a simple, powerful, and highly personal approach to giving.

We offer a variety of giving tools to help people achieve their charitable goals. You can give cash, appreciated stocks, real estate, or other assets, and can receive maximum charitable and tax benefits. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact us at 707.399.3846.