



Here for Good

Community Foundation
for Monterey County

Communications at the CFMC Board Update February 25, 2020



Strategic Plan Goal: Educate the Public about Philanthropy



How? Sharing Stories through

- Advertising
- Print Materials
- Electronic News
- Website
- Blogs/Social Media
- Public Relations

Graphics: Putting a Face on Philanthropy



Faces of Philanthropy – Join Us!



Design *Your* Philanthropic Vision. We can help.



Advertising

- Carmel Magazine
- Carmel Pine Cone
- Monterey County Weekly
- Cultural: (i.e. Symphony, Carmel Music Society)
- Targeted (King City Rustler - (SMCF)
- Coastal Grower Magazine
- Radio (KAZU)

GROWING GIVING

"I enjoy learning about different giving options. My giving has grown to new areas of interest and it's wonderful to see the impact."

— Jean Duff
Jean and Jim Duff Fund of the Community Foundation for Monterey County

Read Jean's story:
www.cfmco.org/Duff

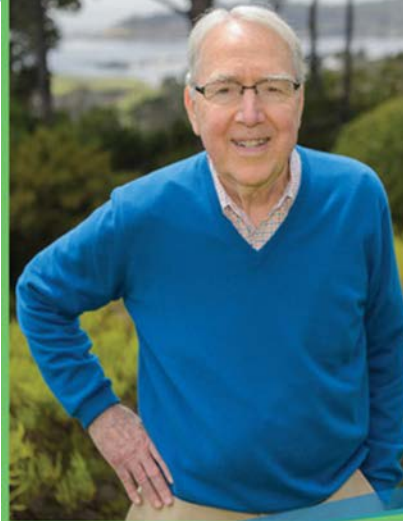


Randy Tunnell

GIVING by Design

"The Community Foundation is a design studio for philanthropy that invites you to pull up a chair at the table. You would be simply amazed at the possibilities."

— Bill Tyler, The William H. and Susanne Tyler Pathway Fund of the CFMC



Read his story: www.cfmco.org/BillTyler

Design your philanthropic vision. We can help.



Donor Advised Funds • Charitable Estate Planning (CGAs, CRTs)
IRA Qualified Charitable Distributions
Scholarships & More

831.375.9712 | www.cfmco.org | [f](#) [t](#) [in](#) [@](#)

TRUST

“We hope to make a difference – to leave things a little better than when we came. We trust the Community Foundation to carry out our wishes. Our giving has evolved to include our family, that’s icing on the cake.”

—Joel and Dena Gambord
Joel and Dena Gambord Charitable Foundation,
a donor advised fund of the CFMC

Music. Arts. Youth. Environment. Education.
Whatever your passion, we can help you design a
giving plan to meet your goals.

Donor Advised Funds • IRA Charitable Distributions
Family Philanthropy • Charitable Estate Planning (CGAs, CRTs)
Scholarships & more



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Dena and Joel Gambord

Read their story:
cfmco.org/Gambords



CARING

"I wanted to contribute to the organization that is taking care of my son and others like him. I feel some peace of mind knowing that even if I'm not here, I will have left behind a small part of me. I am confident he will be taken care of."

*Maria Salazar Segovia
and her son Alberto*

— Maria Salazar Segovia
CFMC Legacy Society member


Maria Segovia established a Charitable Gift Annuity (CGA) with the CFMC to provide guaranteed income for herself during her lifetime and benefit the Gateway Center in the future. Read her story: cfmco.org/Segovia.

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Donor Advised Funds • Family Philanthropy
Charitable Estate Planning (including
Life-Income Gifts – CGAs, CRTs)
IRA Charitable Distributions • Scholarships

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LEGACY

"No matter how much, it's important to give back. I can't imagine anything greater for John, than to continue his legacy of educating kids."

Marti Myszak

— Marti Myszak
The John S. Myszak Scholarship for
Future Teachers of the CFMC

Read her story: www.cfmco.org/Myszak

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Estate Planning (CGAs, CRTs)
IRA Qualified Charitable Distributions
Scholarships & More

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2018 scholarship recipients—Read more at www.cfmco.org/TaylorFarms



“An excellent education is the foundation of a free and fair society. We are proud to support children of our valued team members with academic scholarships to pursue their college dreams.” – Bruce Taylor, Chairman & CEO, Taylor Farms, Taylor Farms Scholarship Fund of the Community Foundation for Monterey County

Design *your* philanthropic vision. We can help.

Donor Advised Funds • Charitable Estate
Planning (CGAs, CRTs) • IRA Qualified
Charitable Distributions • Scholarships & More

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Annual Report



Here for Good
Community Foundation
for Monterey County

ENGAGING

for Good

ANNUAL REPORT 2018

Newsletter

Giving Matters

FALL 2019

COMMUNITY FOUNDATION FOR MONTEREY COUNTY NEWS



Here for Good
Community Foundation
for Monterey County

Giving by Design

What are your interests, values and causes you care about? How do you share them with your family and the world? The Community Foundation for Monterey County (CFMC) helps donors develop their unique vision, and customize a giving plan that works for them.

Whether it's meeting an immediate need such as giving to natural disasters like California wildfires, creating a donor advised fund to streamline giving or donating a piece of real estate to leave a charitable legacy, the CFMC can help clarify solutions to focus and simplify giving.

“We are retired teachers with a modest estate, yet we can still take part in doing good in this world.” —Barbara Brooks

Transforming Real Estate into Income and Giving

Did you know that you can donate real estate or other complex assets to the CFMC to benefit your favorite causes? The CFMC has handled real estate gifts from Orange County to Hawaii.

Recently Steve and Barbara Brooks partnered with the CFMC to donate their Carmel rental property to create a Charitable Remainder Trust (CRT).

"The Brooks were delighted to be able to increase their income and use their property for a charitable purpose that was very



From left: Christine Dawson with Steve Brooks, Sarah Eiko and Barbara Brooks at the Brooks' Charitable Remainder Trust event.

meaningful to them," said Christine Dawson, CFMC Vice President of Philanthropic Services. The CRT will provide income to the Brooks during their lifetimes. Upon their passing, the remainder will create a charitable fund benefiting their favorite causes. Read their story at cfmc.org/Brooks.

Designing Your Philanthropic Vision

Senior Philanthropic Services Officer Brian Thayer and Philanthropic Services Officer Mackenzie Little recently became 21/64 Certified Advisors, learning the art of facilitating multi-generation family philanthropy meetings. Brian and Mackenzie engage donors in important conversations about values and philanthropy, using helpful tools to increase personal and generational awareness. These were put to use in a recent Family Philanthropy Workshop for fund holders (See page 7).

Philanthropy Celebrated: Judge Villarreal Honored

Philanthropy starts with one person's desire to help another. At the annual Celebration of Philanthropy that spirit was evident as Dan Baldwin, CFMC President/CEO, spoke about the record grants made possible by unprecedented generosity.

"Grants come from assets. Assets are gifts and gifts come from people. So grants are people helping people," he told more than 250 friends and supporters in attendance.

Continued on page 4



From left: President/CEO Dan Baldwin, Honoree Lydia Villarreal and CFMC Board Chair Birt Johnson, Jr.

Legacy Newsletter

LEAVING A Legacy

Fall 2019

Composing a Legacy

Marty Wolf

A Vancouver, Washington native, Marty Wolf moved to the Monterey Peninsula after the sale of his business in 1991. Now that he is semi-retired, his love of music inspired him to think about how he could support musical programming to give others the joy it has given him. Marty shared his story with attendees of the 2019 Legacy Luncheon of the Community Foundation for Monterey County (CFMC).

"My mother was a violinist and I took up piano when I was about six. By the age of 13 I could play by ear," said Marty, who had his own band from junior high through law school.

Charitable Gift Annuity – Income for Today, Gift for Tomorrow

Marty partnered with the CFMC to establish a charitable gift annuity (CGA). It was a complicated gift, involving a CGA for two lives, and a transfer of interest in an LLC that held an income producing property for sale in Oregon. Marty was simultaneously working on a similar gift to his alma mater, Willamette Law School.

"Dan Baldwin and Christine Dawson worked closely with my attorney and the Law school to bring all elements of the gift together. They and their staff were incredibly



"As I reflected on how fortunate I am and how much law school and music meant to me, I wanted to pay it forward to others. I have a sense of responsibility for not only the future, but the past, too." – Marty Wolf



Legacy Society member Marty Wolf worked with the CFMC to support music education.

helpful in coordinating among all the parties. Through the CGA we receive payments for life, and my beautiful wife Francesca will be taken care of. The remainder will be used to support jazz and classical musical education and performance. We are confident the Community Foundation will carry out our charitable legacy in the future," he said.

Giving Now – Donor Advised Fund

To enjoy giving now, Marty also created the **Martin R. Wolf Family Fund**, a CFMC donor advised fund. He and Francesca recommend grants to support programs and causes they care about.

Marty continues to immerse himself in music. He sits on the Monterey County Symphony Board of Directors, where he enjoys serving on a committee to select music for future concerts.

Continued on page 2

This newsletter shares stories of those who have made the important decision to include a charitable gift to the Community Foundation for Monterey County through their will or estate. We are honored to partner with you in your philanthropy, now and in the future.

ENews

- Monthly
- CNE News
- Event Thank You
- Targeted:
i.e. Women's Fund,
Affiliate Funds



Here for Good
Community Foundation
for Monterey County

Charles de Guigné Pebble Beach Estate Gift Creates \$18 Million Charitable Legacy

"We're honored Charles entrusted the Community Foundation for Monterey County with this extraordinary gift. We're so pleased we were able to take a complicated asset and transform it into a fund that will forever support the causes he cared about." – Dan Baldwin, CFMC President/CEO



When Charles de Guigné passed away he left his beloved one-of-a-kind estate at 3200 17-Mile Drive in Pebble Beach to create a lasting legacy. Charles, who had no children, wanted his property to be used for a charitable purpose.

He specified through his trust that upon his death, title to the home be transferred to the [Community Foundation for Monterey County](#) (CFMC). He instructed the CFMC to sell the property so proceeds could be maximized for the benefit of others. The gift, a record for the CFMC, sold in November and will benefit the SPCA for Monterey County and Montage Health Foundation. Read how one man's giving will continue in perpetuity. [Read the full story.](#)

Charles de Guigné Story

Every Gift Matters
Giving Tuesday is Today - MC Gives! Makes it Easy

12/3/19 GIVING TUESDAY
MC GIVES!



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donatio
differen

Your ge
[County](#)
million
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the 163

Monterey County Giving

Year-End Giving Options



There are many
giving into you
The CFMC can
[charitable gift a](#)
[Charitable Distr](#)
options offer ta
you make a me
Be sure to mak

[Giving Deadlines](#) for a 2019 deduction.

Options & Deadline

Read Our Fall Newsletter -

Website

- 43,000 Users in 2019
- 84% New
- 64% Female, 36% Male
- 16% Organic Search



Healthy, safe, vibrant communities

The Community Foundation for Monterey County inspires philanthropy and strengthens communities. We partner with individuals, families, nonprofits and businesses to create charitable funds and make grants towards a vision of healthy, safe, vibrant communities.

[Read more](#)



**CREATE
A FUND**



**ADVISE
YOUR CLIENTS**



**APPLY
FOR A GRANT**

Blogs

- President's Blog
- Donor stories
- Grants and Impact
- Shared in social media

December 20, 2019

[President's Blog: Front Row Seat to Generosity](#)



By Dan Baldwin, President/CEO Community Foundation for Monterey County In a joyous time of year what could be more appropriate than emphasizing the joy of giving? The Community Foundation for Monterey County has the pleasure and honor of working with many folks who use

philanthropy to invest in the people of Monterey County. We have a front row seat in...

[Read more](#)

October 1, 2019

[President's Blog: Philanthropy as a Force for Good](#)



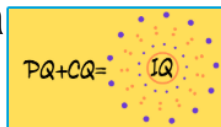
By Dan Baldwin, President/CEO, Community Foundation for Monterey County Fasten your seatbelts. If the past several years produced anxiety about the ability of our governmental systems and civil society writ large to hold fast in the face of unprecedented discourse and

underhanded tactics, the next year or so could be overwhelming. A lot of what creates sleepless nights is a...

[Read more](#)

June 13, 2019

[President's Blog: Passion + Community = Impact](#)



By Dan Baldwin, Community Foundation for Monterey County President/CEO Thomas Friedman famously wrote that PQ (Passion Quotient) + CQ (Curiosity Quotient) = IQ (Intelligence Quotient). If you ever get the chance to hear him speak on this, take full advantage; it's captivating and energizing. With apologies to Mr. Friedman, I'd like to offer a variant for community foundations. The equation...

Record Grants Announced



January 30, 2020 Record Year for Philanthropy Community Foundation for Monterey County grants \$19.2 million in 2019, Surpasses \$200 million total grantmaking MONTEREY COUNTY, CA – People who partnered with the Community Foundation for Monterey County (CFMC) in their philanthropy set a new mark for generosity in 2019. Grants totaling \$19.2 million were awarded to more than 890 nonprofit organizations...

[Read more](#)

January 29, 2020

[My Scholarship Story: Jesus Floriano-Ramirez](#)



My name is Jesus Floriano-Ramirez The Community Foundation for Monterey County has made my college experience a very memorable one. I never imagined myself attending a four-year institution or even standing in front of such a big crowd sharing my journey. I come from very humble beginnings. My parents are both immigrants from the country of Mexico. As a child...

[Read more](#)

January 27, 2020

[Southern Monterey County Awards \\$27,000 in Grants](#)



Monterey County, California – The Southern Monterey County Foundation (SMCF) granted \$27,900 to 19 nonprofit

organizations in December 2019 for projects, programs and capital projects in 2020 serving the residents of King City and points south. To date, \$121,500 has been granted from the SMCF for organizations providing community-based services aimed at improving the quality of life for Southern Monterey...

Social Media

3,284 Facebook Followers
1,520 Twitter Followers
814 Linked in Followers

(2/24/2020)



A screenshot of the Facebook profile page for the Community Foundation for Monterey County. The page header shows the name and a search bar. Below the header is a navigation bar with links: Page, Ad Center, Inbox, Events, Manage Jobs, Notifications, and More. The profile picture is a circular logo with a stylized figure. The bio states "Community Foundation for Monterey County @cfmco". A list of menu items is on the left: Home, About, Events, Photos, Videos, Community, Groups, Reviews, Jobs, Offers, Posts, Join My List, Promote, and Visit Ad Center. The main content area shows a post from February 11 at 2:35 PM. The post text thanks Legacy Society members and supporters for attending the annual Legacy Society Luncheon 2/4, mentioning over 180 guests and speakers Steve & Barbara Brooks. It includes the website www.cfmco.org/legacy and the hashtag #InspiringPhilanthropy. Below the text is a large group photo of attendees. At the bottom of the post, there are three smaller photos of individuals and a "+106" indicating new photos added to the album. The album title is "Community Foundation for Monterey County added 109 new photos from February 4 to the album: Legacy Luncheon 2020 — at Monterey Plaza Hotel & Spa." published by Cristina Medina on February 4.

Share Stories of Impact

**COLLEGE
FUTURES**
MONTEREY COUNTY



Changing Lives Through
Scholarships & Support



Adriana Vieyra: Aspiring for Success



Public Relations

De Guigne, Census 2020,
Grantmaking, Celebration
of Philanthropy and more



75th Anniversary



- **Graphics - Designed new logo, letterhead envelopes** – incorporating logo and messaging in invitations and all advertising
- **Media Outreach - Secured articles** in Carmel Magazine, Coastal Grower magazine and will be promoting widely to media
- **Web and Social Media** - Developing a web landing page, regular messaging
- **Expanded Celebration of Philanthropy** - Monterey Conference Center (new location) October 23 - SAVE THE DATE!
- **Promoting Fund for Monterey County** – inviting people to partner with us



How You Can Help - Be Ambassadors!

- The CFMC is **celebrating 75 years of impact**
- We have **granted more than \$205 million** to hundreds of nonprofits in Monterey and beyond
- We are a **design studio for philanthropy, connecting donors with their interests**
- People partner with us to **fulfill their philanthropic goals, in their lifetime and estate**
- We are made up of more than **550 charitable funds** created by generous individuals, families and businesses
- The CFMC has been entrusted with more than **\$290 million in charitable assets**
- **A Community leader** working on issues from homelessness to affordable housing
- **Anyone can give/be a philanthropist.** Contact Dan or Christine!

We are: “Here for Good”

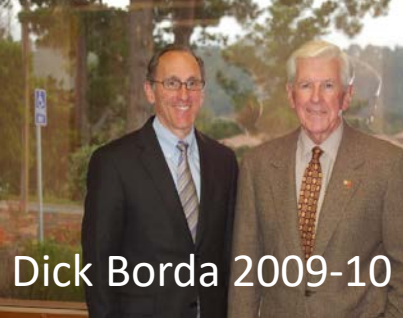


How You Can Help - Be Ambassadors!

- Like, share and comment on social media channels
- Attend Women's Fund Lunch - May 12, 2020
- Attend Celebration of Philanthropy - October 23, 2020
- Refer people to Dan or Christine



Thank you
for your support!



Dick Borda 2009-10



Kurt Gollnick 2011



Craig Johnson 2012



Ann Brown 2013



Gail Delorey 2014



Birt Johnson, Jr. 2019-20



Rick Kennifer 2015



Greg Chilton 2016



Steve McGowan 2017



Ken Petersen 2018