

Communications at the CFMC Board Update February 25, 2020

Strategic Plan Goal: Educate the Public about Philanthropy

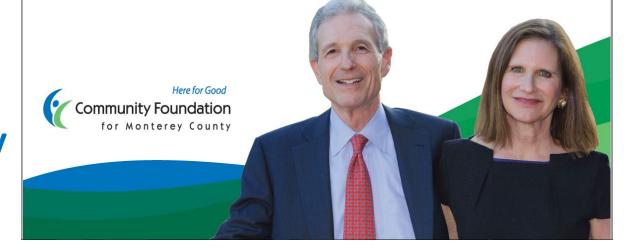
How? Sharing Stories through

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

Graphics: Putting a Face on Philanthropy

CREATE YOUR LEGACY

GUIDE TO PLANNED GIVING



Faces of Philanthropy - Join Us!



Design Your Philanthropic Vision. We can help.

Private & Family Foundation Services

A Customized Approach



Foundation for Monterey County

We Handle the Administration While You Fulfill Your Philanthropic Vision

The Community Foundation for Monterey County (CFMC) offers a variety of philanthropic services to support your local, national or international grantmaking. Reduce your administrative burdens and maximize charitable giving with the assurance that your foundation's philanthropic goals will be achieved in a personalized, cost-effective manner. Private Foundation Services at the CFMC are customized to meet your individual needs.

"I love the 'can-do' attitude of the Community

-Joel & Dena Gambord

The Gambords created the Joel

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What is your legacy? How will you express your values, experiences: and interests to the next generation? By carefully planning your estate, you can create benefits for yourself, your family and your community. With thoughtful preparation now, you can be assured your charitable resources will be directed to the causes you care

Leaving a Legacy

The Gift of a Lifetime

You can establish a fund that supports one or more specific nonprofits, a field of interest, or an unrestricted fund, allowing the CFMC to adapt your fund's grantmaking to community needs over time. When you make a gift through the Community Foundation for Monterey County (CFMC), we establish a fund that becomes your personal legacy of giving.

How it works

- You include the Community Foundation for Monterey County as a beneficiary of your will or trust. We can help you or your attorney with recommended language.
- You determine the type of fund you would like to establish with Upon your death, we set up a fund in your name, in the name of
- your family, or in honor of any person or organization you choose.
- Your charitable gift is excluded from your assets and may decrease estate taxes.
- You can choose to have your gift distributed to the nonprofit organizations of your choice or placed in an endowment so that a percentage is available to make grants every year. An endowment fund creates a permanent source of community capital, helping to do good work forever.

Bill and Nancy Doolittle

"We feel very comfortable making legacy gifts to the Foundation knowing that it will be a good steward of our donations and will make grants that are relevant to the most pressing future needs." nunity

-- Bill and Nancy Doolittle

When Bill and Nancy Doolite wanted to ensure a lasting legacy, they included the CFMC in their estate plans.

"Over the past 25 years, we have witnessed first hand the ever-adaptable grantmaking capability of the Community Foundation.

With a legacy gift it's possible that, in the future, the nonprofit organization(s) of your choice may cease to exist. A legacy gift to the Community Foundation will enable the transfer of future grants to a comparable organization.

The long-term financial stability of nonprofits in Monterey County can be enhanced and secured with legacy donations. We encourage other individuals to consider this method of support."

-Bill and Nancy Doolittle



Siembra Latinos Fund

Cultivating Healthy, Safe, in Monterey County



Raúl Rodríguez, Frank Ramírez, Blanca E, Zarazua, Esg., Ida López-Chan, Daniel Rodríguez, Aurelio Salazar, Jr. Anna Marie Ponce, Not Pictured: Chris Barrera and Erica Padilla-Chávez

About the Siembra Latinos Fund

Join us in creating change and investing in our future for the well-being of Latino families, children and seniors in Monterey County. The Siembra Latinos Fund (SLF) was created by a group of Latino leaders to empower our community to come together and make a difference. Siembra means "to sow," and the fund aims to grow opportunity and strength

Donor Advised Funds

A Personal Approach to Giving



Lary Lynn and Tony Muller. The Anthony and Lary Lynn Muller Fund of the Community Foundation for Mantees County

Simplify Your Giving-Create a Donor Advised Fund

Donor advised funds at the Community Foundation for Monterey County (CFMC) help simplify and maximize the impact of your giving. You make a tax deductible gift to establish your fund and recommend grants over time to the causes you care about. You benefit from the convenience and community knowledge of our professional staff.









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Renefits.

Our team works with

you to create a fund that reflects your charitable

Donor advised funds at the CFMC are convenient, flexible tools for individuals, families, businesses, or groups, making it an ideal vehicle for fulfilling your charitable wishes.

- Easy to establish and manage
- Can utilize a wide variety of assets (such as cash, appreciated stock or real estate)
- Receive immediate tax benefits in the year the gift is made
- Make grant recommendations now or in the future
- Receive grantmaking support and co-investment opportunities from our professional staff
- One gift can support multiple organizations

Healthy Safe Vibrant Communities

- Increased impact by investing and combining your gifts with others
- Simplify your record-keeping with 24/7 online access to your donation and
- Less costly and easier to administer than family or corporate foundations

We are proud to be on the forefront of Latino philanthropy, and to Make Your Gift Work for You help sow the seeds for strong and vibrant Latino community in Monterey County." Charitable Remainder Trusts (CRT)

-Blanca E. Zarazua, Esq.

2017 SLF Board Chair

Here for Good

Foundation

for Monterey Cou

www.cfmco.org/S

and, in return, receive income. The remainder benefits the causes or

A charitable remainder trust is a vehicle into which you can place assets. nonprofits of your choice. How it works

Charitable

Remainder Trust

- You create a trust with the assistance of your professional advisor.
- You donate, appreciated stock, closely held stock, real estate or other assets into the trust.
- You avoid capital gains tax on the sale of the donated asset, and receive a charitable income tax deduction.
- You receive lifetime income for you and/or your named beneficiaries, a portion of which may be tax free. Payments may be fixed or variable. The minimum annual percentage payout is 5%.
- The "R" in CRT is the remainder. Upon your death, the remainder creates a fund at the CFMC that benefits the causes or nonprofits of your choosing. The fund can also support general endowment. grantmaking or create a donor advised fund that your children or another designee can oversee. The fund can be in your name or in honor of any person you choose.
- The fund becomes a permanent philanthropic resource helping to do good work forever. As an endowed fund, the principal is invested and a percentage of the balance is available for granting each year.

CRTs at the Community Foundation are expertly administered by TIAA Kaspick. CRTs are their own legal entity. While not complicated, they should be set up by an attorney.

Company Funds Simplify Giving. Maximize Impact



Giving Back The Community Foundation for Monterey County (CFMC) offers personalized services to help your company plan, govern and operate your community philanthropy. We can help you develop a giving program tailored to your company's interest areas and giving priorities. CFMC staff can also assist with the management of corporate foundations through customized philanthropic services. A company fund at the CFMC can help your business simplify giving and maximize impact.



always had a focus on philanthropy, We're excited to take it to our partnership with the CFMC."

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From Real Estate to Life Income

"Working with the CFMC to plan a legacy of giving has given me great satisfaction and peace of mind."

Jim Vislentine, CFMC donor advised fund holder and Leasov Society member

- Jim Valentine, Dr. James Valentine Fund of the Community Foundation for Monterey County

Jim Valentine made sound investments and gave to many local nonprofits. He owned commercial property in Orange County he no longer wanted to manage. Working with his attorney and CPA, he formed a charitable remainder trust into which he gifted the property. He named the CFMC as the trustee.

The CFMC sold the property, and now Jim receives monthly income from the trust for life. Upon his passing, the remainder value of the trust will create an endowed fund that will benefit the nonprofits of his choosing

"It's very fulfilling to know that the foundation will maintain my vision and my giving will benefit my favorite causes, in my name, into the future." - Jim Valentine





Foundation for Monterey County opened doors to the

us. Their efforts and community knowledge were invaluable."

- Lary Lynn and Tony Muller

"Working with the Community

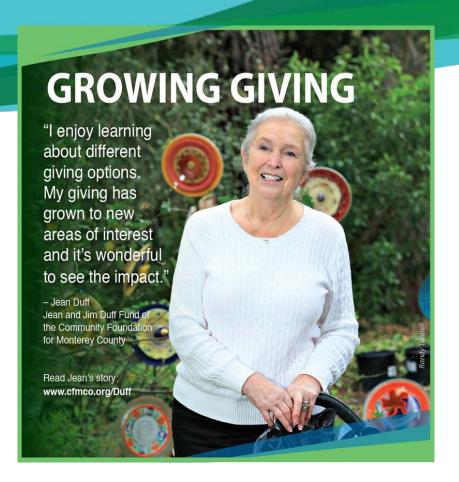
Design Your Philanthropic Vision, We Can Help.

From assisting you or your family with a donor advised fund or leaving a legacy through a planned gift, supporting a private foundation with grantmaking or administrative services, or helping your business with a corporate giving plan, the CFMC is here to facilitate your philanthropy and help you achieve your charitable goals.



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)





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."

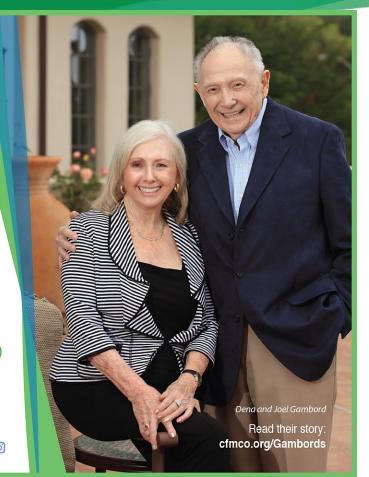
Joel and Dena Gambord
 Joel and Dena Gambord Charitable Foundation,
 a donor advised fund of the CFMC

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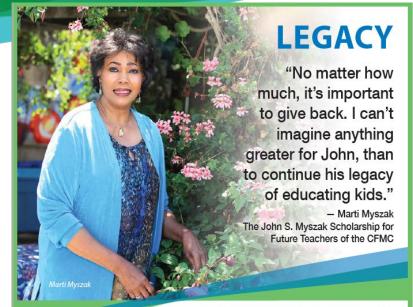
Maria Segovia established a Charitable Gift
Annuity (CGA) with the CFMC to provide guaranteed income for
herself during her lifetime and benefit the Gateway Center in the future.
Read her story: cfmco.org/Segovia.

Design your philanthropic vision. We can help.



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

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Read her story: www.cfmco.org/Myszak

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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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





Newsletter



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

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. -Batter Broks



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



It to ri Ovistine Downon with Stove Brooks, Saruh Filos and Barbaru Brooks feedby the Brooks' Charitable Romainder Trust

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 cfmco.org/Brooks.

Designing Your Philanthropic Vision

Senior Philanthropic Services Officer Brian Thaver and Philanthropic Services Officer Mackenzie Little recently became 21/64 Certified Advisors, learning the art of facilitating multigeneration 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

*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



Eto el President ICEO Dan Brildwin, Hancone Judio Willamed and CFMC Board Chair Birt Johnson, Jr.

Legacy Newsletter

LEAVING A EGILLOY

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.

Community



ENews

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



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





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Monterey County Giv

Year-End Giving Options



There are many giving into you The CFMC can charitable gift a Charitable Dist options offer ta vou 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.











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

Read more

Blogs

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..

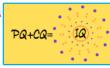
Read more

June 13, 2019

President's Blog: Passion + Community = Impact



- Donor stories
- Grants and Impact
- Shared in social media



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...



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

(2/24/2020)



Ad Center [1]

Community

@cfmco

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Foundation for

Monterey County



Share Stories of Impact



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!

