

# Company Funds

Simplify Giving,  
Maximize Impact



Carmel Realty Company streamlines their giving through the Carmel Realty Foundation of the CFMC

## 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.

## Grantmaking Support

The CFMC provides a range of grantmaking support.

- Vision and strategy development
- Employee matching gifts program
- Creation of proposal guidelines
- Research, due diligence and proposal screening
- Distribution and tracking of grant checks
- Reporting of your corporate philanthropic activity
- Customized scholarship program for your employees and their families

## Administrative Services

The CFMC can ease the administrative burden that comes with reviewing and administering donations, as well as the disbursement and tracking of charitable gifts.

- Marketing and promotion
- Custom web page for your fund
- Press release, and listing in the CFMC newsletter and annual report
- Accounting services

## Personalization

Your giving can be highly customized. We can issue grants checks with your company name and create branded letterhead.

## Your Partner in Philanthropy

Services can be tailored to meet the specific needs of your business.

*Healthy, Safe, Vibrant Communities*



“Our company has always had a focus on philanthropy. We’re excited to take it to the next level through our partnership with the CFMC.”

— Bill Mitchell, Managing Director  
Carmel Realty Company

The Carmel Realty Company has a rich history and a reputation for integrity, longevity and excellence. Now in its fourth generation in local real estate, the Mitchell Family, joint owners of Carmel Realty Company, have made giving back a key component of their company's culture. “We have a strong foundational belief that you share your success and give back to the local community that has given you so much as an individual and as an organization,” says Bill Mitchell. They also build on their employees' generosity through matching gifts, which the CFMC facilitates. Acting on their commitment to supporting important community causes, they partnered with the CFMC to establish the Carmel Realty Foundation, a company donor advised fund that helps them reduce their administrative burden and increase and diversify their giving.





Community foundations provide a simple, powerful, and customized approach to giving. We offer a variety of services to help you maximize your community philanthropy.

## Join us

Achieve your charitable goals with a donor advised company fund.

Click

cfmco.org  
facebook.com/cfmco

## Contact



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## Grant Administration

### Grantmaking Consultation

- **Vision and strategy development** Help you create and implement a strategy for your philanthropy that will transform your values into goals and objectives.

### Grantmaking Support

- **Application process** Assist with the creation of proposal guidelines, identification of eligible organizations, promotion and distribution of RFPs.
- **Selection support** Review and screen proposals as well as advise on selections and award amounts.
- **Due diligence** Conduct local site visits, review financials and assess organization leadership.
- **Research** Provide in-depth assessments of community needs to help determine funding priorities.
- **Reporting** Create requirements, monitor compliance and performance, and collect and review reports.

### Matching Gift & Scholarship Programs

- **Employee matching gift program** Support your employees' generosity through a matching gift program.
- **Scholarship programs** Develop customized programs for your employees and their families.

## Administrative Services

### Administrative Services

- **Process grants** Ease the administrative burden that comes with administering grant agreements as well as the disbursement and tracking of grant funds.

### Marketing & Promotion

- **Creation of a web page** for your fund, press-release (optional) and listing in the CFMC newsletter and annual report.

### Accounting Services

- **Quarterly fund statements** with 24/7 online access.

### Investment Management

- **CFMC funds are professionally invested** as part of a \$197 million portfolio.

*To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County*