



## Planned Giving Support for Endowment Funds

CFCG staff provide support in **developing a planned giving program**, including helping you work with your potential donors and their advisors to determine a giving strategy that best benefits donors, their tax and estate strategies, and your organization's endowment fund.

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### Planned Giving Support Services

- **Accept Unusual Charitable Gifts** – CFCG is able to accept almost any type of asset as a contribution to your endowment fund, cash, stocks and bonds, retirement assets, bequest, LLP and LLC shares, real estate, and other unusual assets.
- **Identifying Prospects** — If individual donors have given directly to your endowment fund at CFCG in the past, Foundation staff can pull a report of your donors who have given consistently to your fund, which is the primary indicator of a planned giving prospect.
- **Targeted Emails and Online Giving** – We can work with you to create an email campaign about planned giving. Your endowment fund will have a page on CFCG's website to accept contributions from your donors using a debit or credit card, which will help you build the fund and identify prospects.
- **Potential for Anonymity** - Donors can choose to give anonymously to your endowment through CFCG.
- **Serve as Trustee of a Charitable Remainder Trust** – If you have a prospect that would be well suited for a Charitable Remainder Trust, CFCG can serve as Trustee for the CRT if the endowment fund is a beneficiary.
- **Development and Planned Giving expertise** – CFCG staff have the expertise to help you work with your potential donors and their advisors to determine a giving strategy that best benefits donors, their tax and estate strategies and your organization. We can go on calls with you.
- **Gift Illustrations** - The Foundation has gift planning software to create individualized gift illustrations for your prospects for more complex gifts.
- **Planned Giving Website** - CFCG has a comprehensive planned giving website that will provide planned giving website content and gift calculators for your organization.

