

TYPES OF FUNDS

You can choose from a variety of funds offered through the Foundation to fulfill your charitable goals and enrich our community for current and future generations.

DONOR ADVISED FUND

Donor Advised Funds allow you to stay involved and direct your charitable contributions to community organizations you choose. This fund is like having a private foundation but without the expense and inconvenience.

FIELD OF INTEREST FUND

You can use this fund to channel your contributions to specific areas of interest. Some of our existing areas include: education, the arts, youth, the environment, seniors, health, and others. For a bequest gift to a Field of Interest Fund, donor's charitable intentions will be honored forever.

SCHOLARSHIP FUND

Scholarship Funds allow you to support higher education by helping undergraduate and graduate students further their education.

DESIGNATED ORGANIZATION FUND

You or your group can support *a specific organization* through a fund at the Fresno Regional Foundation, while receiving maximum tax advantages, additional oversight, and investment opportunities.

AGENCY FUND

An organization can establish a fund by transferring assets to the Fresno Regional Foundation. The Foundation provides closely-monitored investment allocations, endowment management, and oversight to increase fund growth and credibility for the organization.

BOARD'S FUND FOR THE COMMON GOOD

Your gift to this fund allows the Fresno Regional Foundation Board of Directors to respond to the most compelling and immediate needs of the community.

SUPPORT ORGANIZATION FUND

This alternative to a private foundation allows you to maintain personal involvement with the fund and support the causes you care about most, while enjoying the favorable tax treatment of a public charity. The Foundation handles investment management, startup costs, grant administration, and reporting responsibilities.

Any of these funds can be endowed, thus preserving your charitable intent forever.



www.fresnoregfoundation.org
559.226.5600

The Fresno Regional Foundation is an affiliate of the National Council on Foundations and a member of the League of California Community Foundations.

your vision
the valley's *future*



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FRESNO REGIONAL FOUNDATION THE CENTRAL VALLEY PHILANTHROPIC LEADER

The Fresno Regional Foundation (FRF) is the community foundation for the Central San Joaquin Valley.

For 45 years, we have worked to improve the quality of life in our region through philanthropy.

Our expertise, experience and deeply-rooted connections to the area have made us the trusted steward for charitable giving in the Valley.

GIVE NOW

You can enjoy seeing the good that comes from your giving. At the same time, you can build a personal legacy of philanthropy. Gifts to FRF impact the causes that are most meaningful to you and create lasting change in our community.

You can make gifts of cash, stock, real estate, or other assets. By giving to FRF, a public charity, you earn the maximum tax advantages for your contribution.

PLANNED GIVING

Your personal philanthropic legacy will continue forever. Everyone has unique charitable interests and financial circumstances. We help you develop a highly personalized giving strategy, insuring that your charitable intentions are honored forever. There are a variety of planned giving methods that include: bequest by will, charitable trusts, and beneficiary designation.

BENEFITS OF GIVING THROUGH THE FOUNDATION

The Fresno Regional Foundation is a responsible steward of donor assets with a history of helping residents give back to the community in the most effective ways possible. The Foundation offers a variety of unique benefits, including:

SIMPLE, NO-COST START-UP

Establishing a fund involves an initial gift, a signed Fund Agreement, and no set-up fees. Your fund can be established quickly and at any time, and gifts are immediately tax deductible. Administrative costs are kept to a minimum because the Fresno Regional Foundation is able to pool funds to create significant efficiencies.

MAXIMUM TAX ADVANTAGES

As a public charity, the Fresno Regional Foundation offers you tax advantages that cannot be obtained through many other giving mechanisms.

SAFETY AND STABILITY

You will have access to FRF staff who are trained and experienced in charitable giving and effective grantmaking. Grants are monitored through site visits and reporting requirements. The Fresno Regional Foundation complies with the National Standards Certification requirements. All the Foundation audits, annual reports, and charitable certifications are easily accessible on our website.

COMPLEX GIFTS

The Fresno Regional Foundation has experience with complex gifts such as real estate, stocks, bonds, insurance policies, and a variety of distinctive assets.

TIMING

Gifts to the Fresno Regional Foundation can be made in a year that maximizes the tax benefits to you. The Foundation invests and grows the donations over time. Then months or years later, the Foundation can make well-timed disbursements to your favorite charities to have the greatest possible impact on our Valley.

FLEXIBILITY

Unrestricted gifts to the Foundation allow us to address the most pressing needs as they arise. The issues facing the Central Valley today may not be the issues of the future. Our staff closely monitors the needs of our Valley to ensure grants from unrestricted or field of interest funds have the greatest impact.

PRIVACY

Your giving can be as public or private as you like. By identifying your fund with your family or company name, you can be acknowledged and your example can influence others to give. You always have the option of remaining anonymous.



working *together* to
make a difference

The Fresno Regional Foundation staff welcomes the opportunity to meet with you, your financial advisors, attorneys, accountants, and estate planners. The Foundation is an invaluable resource for professional advisors and can help them identify the gifting options that maximize tax advantages, ease administrative burdens, and make the greatest impact possible on the Central Valley.