



Bold Giving. Local Impact.

for professional advisors and their clients.

Greater Everett Community Foundation
Serving all of Snohomish County

Looking Forward. Giving Back.



**Our business
is helping
people give.**

Do your clients have questions about estate planning? Maybe they want to leave a legacy. Perhaps they need to make the most of a tax deduction. Your client can choose from several options to support their favorite causes or charities. It's an easy way to give to multiple charities and a low-cost, simple alternative to a private foundation. Your clients stay involved in their charitable giving and we handle the administrative details.



**Relationships
matter to us.**

We understand that your client relationships are the most important part of your job. We let you take the lead with your clients while we help in the way that suits your client's needs the best.



**Growth and
stability.**

Your client gets an immediate tax deduction for the money they use to create a fund, even if they are unsure of which charities they ultimately want to support. The money is pooled with other funds and invested together, which yields stronger growth over time. Your clients use the fund earnings to make grants. We have \$15 million in assets and expect to grow to \$50 million by 2021. Our average rate of return over the past 10 years is 7.5%.



**Giving made
easy.**

Every client is unique. Every financial situation is different. We accept a wide variety of assets, and can facilitate even the most complex forms of giving. We offer the maximum tax advantage under state and federal law and we simplify IRS record keeping.



**Local
expertise.**

With more than 500 nonprofit organizations in Snohomish County it can be difficult to provide charitable expertise to your clients about the entire nonprofit sector. Fortunately, we can help and we're free. As a nonprofit, our mission is to help donors improve our community through efficient and effective giving. We can even speak with you privately about the nonprofit sector, so you are well-prepared for a client meeting.

The Community Foundation provides a way for a donor to give to specific charities, communities or causes. Anything is possible. Just tell us what you care about. We will share ideas and help you come up with a plan tailored for you.



Give Now.

I can start a charitable fund today with \$25k or \$5k per year for 5 years for an immediate tax savings.

Give Later.

I need some time to consider a bequest. I may want to give to a charity or cause in my will.

Here's How The Community Foundation Can Help

- Create a fund agreement so we know which charitable causes you'd like to support.
- Grow your fund. The 10 year average rate of return is 7.5%.
- Receive earnings and award grants.

Funds For Nonprofits.

Designated Funds.

Started by a donor for a specific nonprofit of their choice to help with operations or a program. These funds can be named in honor or memory of a loved one.

Agency Endowments.

Established by a nonprofit with their own agency money from savings, donations or bequests. Individuals can help grow these funds. The nonprofit receives one grant per year from the earnings.

Funds For Active Donors.

Donor Advised Funds.

Donors start a fund and use the earnings to make grants to their favorite local programs, services or nonprofits.

Funds For The Community.

Anyone can donate any amount of money to help grow these funds in the areas of Arts & Culture, Education, Environment, Health & Wellness, Human Services. Grant applications are accepted and reviewed by community volunteers who decide on funding. Grant criteria changes as community needs shift.



Why Give NOW?

Your clients can receive immediate tax savings through gifts of cash, securities, and real estate and see the benefits of their charity today. They can...

- Decide over time where to give with a donor advised fund. A great alternative to a private foundation. They will receive greater tax advantages, gain access to our expertise of the nonprofit community and we handle the administrative work.
- Designate a favorite charity with a fund that will give over and over. A great alternative to a lump sum gift.
- Create a charitable legacy with a gift to a Community Fund for any amount: arts & culture, education, environment, health and wellness, or human services. Put your trust in the Community Foundation staff and community volunteers to select the best projects in the field of choice.
- Take time to fully develop their charitable ideas, while taking advantage of an immediate tax event that requires action now.

How to Give LATER.

Your clients can create a fund agreement that details how their gift will be dispersed through...

- Their estate plans. We accept a variety of gifts from securities to real estate.
- The sale of a business. Call us when you start your planning.
- Life Insurance plans, IRAs, Charitable Lead or Remainder Trust. If you plan it we can administer it.

Greater Everett Community Foundation

For more information you can visit our website section just for professional advisors.

www.gretereverettcf.org/plan

or contact Elena Pullen-Venema at 425-212-4056 or elena@gretereverettcf.org

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