



*Professional Advisors*

# CLIENT SERVICES

The Community Foundation of Northern Colorado serves as a community think tank, a catalyst for community projects, a service provider to philanthropists and nonprofit organizations, and a trusted steward of long-term and often complex gift arrangements. We are a one-stop shop for philanthropy and manage and administer more than 500 charitable funds and over \$110 million in assets. Donations to our funds are tax deductible and grants from the funds are distributed to public charities, schools, and churches based on the charitable intent of our donors.

## Expertise

- Tax-advantaged charitable vehicles and customized giving plans
- Complex gifts (publicly traded and closely held stock, real estate, water rights, sale of business, etc.)
- Estate planning and deferred gift arrangements (gift annuities, CRTs)
- Legacy planning and tools for family philanthropy
- Work-place giving, matching campaigns, and giving groups
- Nonprofit sustainability, capital campaigns, and endowment building



*"I recommend the Community Foundation to my clients that are charitably inclined because of the confidence I have in Ray Caraway and his staff. I've found over the years my clients prefer to be dealing with people in this area of expertise that are local and they like being able to sit across the table with someone they know and trust."*

**Brian Burck** | Financial Advisor, Edward Jones

## Advantages

- 1. Simplified Giving** – Working with the Foundation makes giving easy and enjoyable. We eliminate the tax reporting, administration, and expense of operating a private foundation and offer a simple online platform to manage your charitable giving. The Community Foundation is a service provider and vehicle for charitable giving, not an end user of gifts, and our donors typically give to multiple nonprofits through a single fund.
- 2. Experienced Staff** – The Foundation's 12-person team is skilled in customizing charitable giving opportunities and is available to discuss any aspect of charitable giving with you and your clients. We are deeply engaged with the nonprofit community and can help your clients make an impact today and for generations to come.
- 3. Permanent Presence** – The Foundation is a permanent community institution that has a legacy of strong financial stewardship and the utmost regard for the wishes of our donors. Approximately half of our assets are permanently endowed to benefit future generations. By working through CFNC, bequests and deferred gift arrangements can benefit multiple nonprofits.