COMMUNITY FOUNDATION OF NORTH CENTRAL WASHINGTON
SERVING CHELAN, DOUGLAS, AND OKANOGAN COUNTIES

Anyone
Can
Give
What is the Community Foundation of NCW?

The Community Foundation of NCW is a tax-exempt public charity that administers and invests permanent charitable funds created by individuals, families, businesses and organizations for the good of the region.

Since 1986, the Foundation has responded to the needs of North Central Washington communities by supporting organizations and activities that advance the quality of life. One of the ways in which the Foundation fulfills this commitment is through managing charitable gifts from people like you who care about their community.

Anyone can give. The Foundation offers an intentional and organized way for you to go beyond simply giving income — it allows you to transfer a portion of your assets into charitable funds that give back to the causes that mean most to you. Through prudent investment of pooled resources, foundations ensure future generations will be able to access financial resources necessary to preserve and improve upon the quality of life in their communities.

You can create a named fund with a **minimum gift of $5,000** (Scholarship Fund is $10,000). Contributions can be made at any time, adding gifts when it is to your best advantage. Donations to your fund can be made right away, or a fund can be established now and funded through a deferred gift from your estate. The administrative fee for funds is generally 1%, allowing maximum benefit to your charitable cause.

Gifts can be made by cash, publicly traded stock, real estate, or closely held stock. Deferred gifts may be made in the form of bequests, Charitable Remainder Trusts, Individual Retirement Accounts (IRA), or Life Insurance.

Your Community Foundation ensures you can give back for good, for ever.

Since 1986, the Community Foundation of NCW has disbursed **$24.4 million in grants** to meet vital needs and enhance our communities. Over **$2.5 million in scholarships** have been awarded to NCW students.
5 Reasons to Give To Your Community Foundation

1. **Giving Grows Here**
   An annual spending policy allows us to invest the principal while you spend the earnings on the causes you care about. Establishing a fund amplifies our investment power, providing your giving to grow over time so you can leave a legacy for generations.

2. **Flexible Giving Options**
   There are many ways to give. We tailor funds to meet your philanthropic dreams with friendly, expert customer service. We can accept a wide variety of assets, provide tax advantages, and can work with your professional advisor to better understand your charitable investment opportunities.

3. **Professional Management**
   The Community Foundation is a secure investment of your charitable dollars. Our diverse portfolio is managed by local and national professionals who are experts in their field and independently audited on an annual basis.

4. **Community Insight**
   We build strong relationships with nonprofit public charities across North Central Washington. As one of the only grant funding resources for many of our region’s nonprofits, we gain knowledge and insight on community needs and those agencies responding most effectively.

5. **Trusted Leadership**
   Our Board of Trustees is comprised of leaders in our communities with diverse professional skills that provide thoughtful, strategic oversight of our community’s endowment. Combined with staff expertise and personalized service, your foundation works to maximize impact throughout the region.
Ways You Can Give

The Community Foundation of NCW offers a variety of giving options to help carry out your charitable dreams. The Foundation provides professional fund management, grant making assistance, and personalized, tailored giving services to every donor. Our goal is for you to enjoy all the rewards of giving and leave the rest to us.

**AGENCY ENDOWMENT FUND**

Established by any not-for-profit agency, this endowment protects the principal of the fund and disburses annual income to your organization while allowing the funds to be professionally managed and invested for growth. Pooling resources in this way is a joint benefit for growing the financial resources to protect and enhance our communities through your nonprofit’s mission, while taking the burden of investment management off of your agency.

**DESIGNATED FUND**

Donors who want to financially support one or more specific charitable organizations on a regular basis usually choose to establish a Designated Fund. This allows ongoing giving to the programs you are most passionate about during your lifetime and beyond.

**DONOR ADVISED FUND**

A Donor Advised Fund is like having your own foundation. This fund allows you (or a designee) to serve as advisor to recommend grants from the fund. The fund is invested for growth, allowing you to make gifts to the principal of the fund for greater grant making. Beyond your lifetime, your children (or beneficiaries you determine) can continue to make grants from the fund. If you give $5,000 or more a year to various charitable causes, this fund is for you!

**FIELD OF INTEREST FUND**

Do you love to support the arts? Education? The environment? A field of interest fund allows your contribution to support the many organizations that are working to improve and enhance a particular area of interest, but leaves the selection of the grant recipients to the foundation. Working with regional charitable programs since 1986, your community foundation understands the needs of the region and those agencies doing great work to meet those needs.

Supporting Their Passions

Earl and Barbara Tilly

“We support a number of charitable organizations through the foundation. **By gifting shares of appreciated stock to one place, we can easily designate where we want our gifts to go.** We have long been supporters of Scouting in our area. We set up a special fund to be used to help very low income youth attend summer camp.”
Funding Our Future Leaders
Rowland and Ethel Jones

Rowland and Ethel Jones both attended Waterville High School, graduating in 1931. After some travelling, they landed in Cashmere, where they lived throughout their life. Rowland was a civil engineer for the Washington State Department of Highways and Ethel was the City Clerk and City Treasurer. Among other activities, they were active in the Antique Car Club and spent many weekends chaufferuring royalty and dignitaries in parades. They did not have children, but doted on their many nieces and nephews like an additional set of grandparents. They lived conservatively, were active in community service, believed strongly in education, and felt they had been blessed growing up in Waterville. They wanted to give back in a way that was helpful to graduates from their hometown. Today, their scholarship provides two Waterville graduates with a $3,000 scholarship to college, university, or trade school.

FUND FOR THE FUTURE

Responsible, safe, and reliable stewardship of our region’s charitable endowment is our number one priority. Your community foundation exists to ensure there are financial resources to continue to improve, protect, and enhance our communities – forever. Your gift to the Fund for the Future provides unrestricted support for the ongoing administrative needs of the foundation, helping keep our fees low and provide maximum charitable benefit for our donors and the community.

METHOW VALLEY FUND

The Methow Valley is a special place. Its beauty is adored by outdoor enthusiasts and artists, and the people who work, live, and play in the Valley want to sustain its unique spirit and ensure its responsible growth and vitality. The Methow Valley Fund was established to provide sustainable funding for a healthy, vibrant Methow Valley. The fund provides an annual grant program that awards nearly $60,000 annually to support Methow Valley nonprofits. The fund is advised by a diverse group of volunteers who live and work in the valley and are passionate about supporting charitable work in the community.

SCHOLARSHIP FUND

Establishing a scholarship fund may be one of the most rewarding charitable giving experiences. Each year, our foundation receives over 1,500 applications from students across North Central Washington who are in need of financial assistance to attend college or university. Every scholarship is unique: you determine the criteria. Whether you want to support students in a specific area, or heading to your alma mater, or giving someone a second chance – starting a scholarship fund gives you an opportunity to significantly and directly impact someone’s life. Awarded annually, a scholarship committee selects recipient(s) based on the criteria you set. Your participation in selection is optional.
Leave Something Meaningful

They say “you can’t take it with you”. So why not leave something that is meaningful? Your Community Foundation offers many ways to thoughtfully plan your charitable gifts beyond your lifetime. Leaving even a small portion of your estate could impact your community and the causes you care about - forever. We can work closely with your professional advisor on your giving opportunities and develop a plan that is right and meaningful for you.

**Bequest / A provision in your will**

Perhaps the simplest form of planned giving is the vehicle most commonly used. A bequest allows you to make a provision in your Will or Living Trust for a gift to the Community Foundation of NCW. The gift may be a specified dollar amount or percentage of your estate. The gift can be unrestricted, or can be established as a named fund of your choice.

**Charitable Remainder Trust (CRT) / An income stream for life**

A CRT allows you to give an asset - such as cash, securities, or real estate - in a trust, which is then re-invested. Gifts to a CRT are tax deductible and no capital gains tax is paid when the securities or real estate are sold. The CRT provides income to you and/or a loved one for life or for a set number of years (maximum 20) after which the remaining assets go to your Community Foundation to establish a named fund that will fulfill your charitable goals. The income may be a specific annual dollar amount or a percentage of the trust.

**Individual Retirement Account (IRA) / Direct your IRA for charitable good**

Designating your Community Foundation as a beneficiary of an IRA is an excellent way to make a gift to charity, using an asset that otherwise might be heavily taxed (up to 80%) as part of your estate.

**Life Insurance / Provides tax deduction benefits**

Name the Community Foundation as the owner and beneficiary of a new or existing life insurance policy and receive a current income tax charitable deduction. You may also name the Community Foundation as a beneficiary of an existing life insurance policy and receive an estate tax deduction upon death, easing the burden on loved ones while fulfilling your charitable dreams.

If everyone in North Central Washington left 5% of their estate to the Community Foundation of NCW, it would provide $7 million a year in charitable resources to support the needs of our region.
Leaving a Legacy, Forever
Harold and Margaret Weed

Harold Weed was a visionary. He grew up on the family orchard in Malaga and graduated from Wenatchee Valley High School in 1932. He married Margaret in 1941, and together they were known as the “dynamic duo”. A full time orchardist, Harold was pivotal in the growth of the town of Malaga, opening its first grocery store, barber shop, and residential apartments. He was instrumental in the creation of the Three Lakes Golf Course, and a member of the group that developed the Mission Ridge Ski area. Margaret was a public school teacher for 47 years.

Both he and Margaret were avid community supporters, involved in various civic clubs, and worked together at the Chelan County Fair for over 30 years. The Weeds gave their hearts, time, and money to support the growth of their community. Through a Designated Fund at the Community Foundation, their legacy continues through annual gifts to the organizations they loved so much during their lifetime. The power of their endowment will allow their gifts to continue forever.

Support Your Nonprofit Community

There are over 500 nonprofit organizations across North Central Washington that are serving the needs of our region. They are food banks and homeless shelters, senior centers and children’s programs, artistic and cultural experiences, land protection, and much more.

Your Community Foundation supports these agencies through grant-making opportunities funded by the earnings on our endowment. We also serve as a leader in nonprofit management, developing programs that help organizations improve their capacity for growth and sustainability so they can better achieve their missions.
Anyone Can Give.
Join Us.

SERVING CHELAN, DOUGLAS, AND OKANOGAN COUNTIES

We grow, protect, and connect charitable gifts in support of strong communities.