



Ways to Give

Good Grows Here



What is the Community Foundation of NCW?

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

Since 1986, the Community Foundation has managed charitable gifts from people like you who care about their community to advance the quality of life across the region. We do this by:

Making Grants

The Community Foundation of NCW is one of the only resources for grant-seeking nonprofits in our region. Through the Community Grants Program, nonprofit organizations can apply for financial support to improve and enhance our communities.

Building Philanthropy

Whether you give your time or money, whether you are able to give big or small – every gift matters. Your generosity helps to build and inspire a culture of philanthropy in our region and we are here to help elevate your impact.

Raising Awareness

There are over 500 nonprofit organizations in Chelan, Douglas and Okanogan counties working to improve, protect, and enhance our region. Our Give Campaigns help raise awareness of their work and provide opportunities to support them with any size of gift.

Growing Endowment

Our funds are invested and professionally managed through a diverse portfolio with a strong record of growth. Your charitable fund grows over time, allowing long-term support of the causes you care about.



**Your Community Foundation
helps good grow here.**

5 Reasons to Give To Your Community Foundation

1 Good Grows Here

Establishing an endowed fund amplifies the power of investing, allowing 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 advisors to better understand your charitable giving opportunities.

3 Professional Management

The Community Foundation is a secure investment of your charitable dollars. Our diverse portfolio is governed by our Board of Trustees with the help of expert investment management advisors. Our financials are independently audited on an annual basis to ensure fiduciary excellence.

4 Community Insight

We build strong relationships with nonprofit partners 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 ways to address them 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.



Easy, Flexible Giving

Don Linnertz & Scott Wallace

"When we moved to the Methow Valley in 2015 and shifted our charitable giving to local efforts, it made perfect sense to move our Donor Advised Fund too. After nearly a decade of exceptional help from CFNCW and being part of the local impact our giving created, we made the decision this year to include the Methow Valley Fund in our estate planned legacy giving. Our DAF makes it easy to deposit tax advantaged funds, review our balance, request grants and seek advice from a trusted staff member when we need it. Knowing our impact can live on through planned giving gives us peace of mind knowing that the organizations we cherish can count on our support in the future."



Giving is personal. We keep it that way.

The Community Foundation of NCW offers a variety of giving tools to help carry out your charitable dreams. We provide 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.

FLEXIBLE GIVING

Donor Advised Funds are like having your own foundation. They allow you (or a designee) to serve as advisor to recommend grants from the fund. The fund is invested for growth, so when you're not giving it away, it's growing! During high-income years, establishing a Donor Advised Fund (DAF) can offer tax-smart benefits. They also include succession plans allowing your charitable assets to work for you beyond your lifetime.

BUILDING FUTURES

Scholarship Funds provide a rewarding charitable giving experience. 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, university, or a trade school. 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 the selection process is optional.

KEEPING IT LOCAL

Legacy Funds provide annual grant funding to qualified nonprofits in specific geographic areas. Each fund has its own Local Advisory Board that draws upon its knowledge of the area to determine grant awards that have the biggest impact in their community. A gift to a Legacy Fund, during your lifetime or through a bequest, will help build the endowment and increase the grant award allotment each year.

LEGACY FUNDS SUPPORT CHARITABLE CAUSES IN THEIR COMMUNITY, BY THEIR COMMUNITY.





A Legacy Gift to Honor a Friend

Bruce Williams and Gro Buer

“When we first bought our Leavenworth place on the Icicle, Dick and Tina Rieman had their horses in our pasture, which delighted us. Dick, who was passionate about the Icicle and Wenatchee Rivers, drove us around and acquainted us with the biology, hydrology, and water use issues facing the watershed in the Upper Valley. Over

the 20 years we knew him, we found him to be a determined, ethical man who had an infectious laugh and stellar smile. To honor his contributions to the Upper Valley, we are making this gift to the Upper Valley Fund to continue his legacy. We hope that others will contribute to this fund, either the long term endowment or immediate use.”

A gift to a Legacy Fund may be dedicated towards the annual grant funding or it can be endowed to help the fund grow in perpetuity and increase the award allotment each year.



FAVORITE CAUSES

Designated Funds are for people who want to financially support one or more specific charitable organizations on a regular basis. This allows ongoing giving to the causes you are most passionate about during your lifetime and beyond. Simply choose one or more charities you want to support and they receive your gift annually in your fund's name.

Field of Interest Funds allow your contribution to support the many organizations that are working to improve and enhance a particular area of interest (such as the arts, environment, or education) but leaves the selection of the grant recipients to us.

PARTNERS IN GIVING

Partners in Giving provide unrestricted support for the ongoing programmatic activities of the foundation. PIGs (as we lovingly call them) give a boost to our annual grant making awards, help round up our scholarships, and promote community philanthropy by supporting the online crowd-funding campaigns benefitting hundreds of nonprofits throughout the region. PIG dollars also help the foundation launch new initiatives such as the Leadership Institute of NCW and respond to urgent needs and emergencies in our communities.

Ways to give. Today and forever.

Your Community Foundation offers many ways to thoughtfully plan your charitable giving today and beyond your lifetime. Leaving even a small portion of your estate will make a lasting impact in your community and to the causes you care about - **forever**. We can work closely with your professional advisors on your giving opportunities and develop a plan that is meaningful for you.

Gifts of Stock Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. When you gift publicly traded stock, your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock.

Qualified Charitable Deduction (IRA) and Giving Cards Gifts from your IRA Qualified Charitable Distribution (QCD) may be applied to most funds at the Community Foundation or we can accept the gift and pass it on to one or more qualified nonprofits (eg: 501c3 public charity, school, government agency).

Bequests A bequest allows you to make a provision in your Will, Estate Plan, or Living Trust for a gift to the Community Foundation. The gift may be a specified dollar amount, percentage, or the remainder of your estate after providing for your family and friends. The gift can be unrestricted, or can be established as a named fund of your choice.

Donor Advised Fund Succession Plans are a valuable tool for your charitable estate planning. Simply name your Donor Advised Fund (DAF) in your estate plan, then work with us to create a Succession Plan to determine what happens with those charitable assets. The Succession Plan is highly flexible – you can keep some funds in the DAF for your heirs to advise, you can create a scholarship fund, or a designated fund to benefit your favorite charities, or a field of interest fund to support a particular cause – or any combination thereof. The best part is that you incur no legal fees when you work with us on this plan and can revise it, free of charge, at any time.

Charitable Remainder Unitrust (CRT) is a separate legal entity managed by a Trustee (such as the Community Foundation). The CRT provides an annual income to the named beneficiary(ies) for a term of years, or life. The remaining assets at the end of the term of the Trust are used to establish a named fund at the Community Foundation that fulfill your charitable goals. A CRT allows you to give an asset such as cash, securities or real estate, which is then reinvested and provides an immediate income tax and capital gains benefit.

IRA/Life Insurance Beneficiary Designating the Community Foundation as a beneficiary of an IRA is an excellent way to make a testamentary gift to charity and take advantage of a tax deferred asset in an estate plan. Life insurance gifts include gifting a premium paid policy outright or adding the Community Foundation as a beneficiary. For new or existing policies where a premium is due, making the Community Foundation the owner and beneficiary will result in a current income tax deduction as well as an annual deduction for the premium payment. Both types of Life Insurance gifts provide potential estate planning benefits.

Working with Professional Advisors is important in your charitable giving plans. Whether it's your attorney, financial advisor, or CPA, we partner to make sure that your philanthropic interests are met with maximum benefits. If you're looking for charitably-minded Professional Advisors, we have a curated list on our website at www.cfncw.org/professionaladvisors.



Keeping Giving in the Family, Forever

Jerry Gibbons

Charitable giving runs in the DNA of the Gibbons family. Jerry, pictured with some of his great-grandchildren at left, is an Heirloom Society Member, along with his late wife Barbara, his parents, and aunts and uncles. After his lifetime, his children will be able to continue making gifts from his fund.

More importantly, he hopes his grandchildren, who are 6th generation to NCW, get involved in their communities and open their own funds to give back to the place they call home. There is no doubt these young Gibbons will continue leaving their philanthropic legacies, and the Community Foundation is honored to be part of this generational generosity that benefits our region.

A Donor Advised Fund Succession Plan is a valuable tool for estate planning. You can create the plan today and determine where you want the funds to be applied as well as any heirs that you want to be advisors to the fund. It can be revised and changed any time free of charge with the Community Foundation.

Heirloom Society

The Heirloom Society was established to honor individuals and families who have committed to leaving a legacy to future generations through the Community Foundation.

Consider the definition of **heirloom**:

- a piece of property (such as a deed or charter) that descends to the heir as an inseparable part of an inheritance of real property;
- something of special value handed down from one generation to another;
- a variety of plant that has originated under cultivation and that has survived for several generations usually due to the efforts of private individuals.

Joining the Heirloom Society allows us to honor and thank you for caring for the future of NCW during your lifetime and help ensure your charitable work continues beyond your lifetime. There are no dues or other obligations, but as a member you will be kept informed of the work of the Community Foundation and included in special events and programs.





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BUILDING STRONG COMMUNITIES

Community Investments

We've made giving and receiving more local to help make a bigger impact in communities across the region. Legacy Funds provide competitive **grant opportunities to nonprofits in every community** in NCW and are awarded by Local Advisory Boards comprised of community volunteers, giving every community a voice in their community's investments. • Give Methow and Give NCW provide **easy opportunities for anyone to give** in any amount to their favorite nonprofits. • Impact Investments provide opportunities for the Community Foundation to help **make a significant difference in a North Central Washington community**.

Community Leaders

Strong leaders, skilled in civic management and civil discourse, are key to strong communities. That's why we are taking a proactive role in **training our next generation of civic minded leaders** by offering the Leadership Institute of NCW. This program is designed to develop strong leaders skilled in civic engagement and civil discourse. • The Nonprofit Practices Institute continues to **build capacity and skills** throughout the nonprofit sector in NCW with over a decade of successful board and staff training opportunities.

Community Enrichment

Our presence in both Wenatchee and Omak provides **convening space and resources for nonprofits** and a physical space for donors to get involved and connect with causes they care about. • We're **bolstering our collaborative partnerships** with local agencies to secure additional funding and participation in support of our new direction. • Added staff has provided more capacity to continue programming that aims to **build a culture of philanthropy in our region**.