

CORPORATE philanthropy

your **opportunity to help** *your* **business and invest in** *your* **community**



Your Guide to Corporate Giving

Whether you're a large corporation, small business, or individual who wants to invest in their community while getting the maximum tax benefits, the Community Foundation of Southern Indiana can provide you with the best tools to make the most of your philanthropic gifts.

This guide will answer many of the questions you have about corporate giving and the benefits you will gain from designing a customized giving plan for your business.

The Community Foundation of Southern Indiana accepts a wide range of gifts from real estate to closely held stocks while providing you with expert advice and flexible tools that allow you to invest in your community and protect your interests at tax time.

the art of corporate philanthropy

The Community Foundation of Southern Indiana (CFSI) is a nonprofit organization designed to help individuals, corporations and small businesses support their charitable interests by creating customized charitable funds. Creating your own fund can help you make smart investments in your community while offering the maximum tax benefit for you and your business.

Advantages of Giving Through CFSI

Simplicity: we make it easy to set up your fund and give more efficiently to all your causes

Tax Benefits: most gifts receive the maximum tax advantage under state and federal law

Local Organization: we have deep community roots and regional knowledge and play an active role in our community

Service: we provide highly personalized service tailored to your charitable and financial interests

Flexibility: we can accept a wide variety of assets, at any time, and can facilitate the most complex forms of giving

Partnerships: we will partner with you and/or your professional advisor to create highly effective approaches to charitable giving

Permanence: we build endowment funds that benefit the community forever

Anonymity: you may make any or all of your gifts anonymously, if desired

Recommend Your Own Investment Manager

You may recommend your own investment manager to invest your donated assets - instead of being pooled with other Foundation endowments - if you wish.

The Foundation's policies allow this for donors who contribute at least \$100,000 to a new endowment fund.

Establish Your Own Spending Policy

The Community Foundation also allows you to recommend a different spending rate for your endowment than the Foundation's usual rate.

If you prefer, you may recommend a rate greater or less than the Foundation's current rate, assuming you contribute at least \$500,000 to a new endowment fund.

Our Mission

To build enduring charitable resources used to positively impact our community by:

- Serving as a partner and resource for donors, their advisors, and area nonprofits.
 - Making it simple for donors to fulfill their individual goals in giving back.
 - Providing stewardship of donor gifts and charitable intent for generations to come.
 - Fulfilling a leadership role on important community issues.
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donor *advised* funds

Donor Advised Funds are convenient, flexible tools for individuals, families, businesses or groups that want to be personally involved in suggesting grants made possible by their funds. If you have a range of community interests, you may find that this is an ideal vehicle for fulfilling your varied charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

With a donor advised fund you can add to the fund at any time, receiving tax benefits with each new gift. You can establish a fund today and make grant recommendations now or in the future. And if you endow your gift, it becomes a permanent community funding resource.

How It Works

Donor: Establishes Fund & Recommends Grants

CFSI: Invests Gifts, Grows Funds, Handles Due Diligence and Administrative Responsibilities

Nonprofits: Recieve Grants from Donor Fund via CFSI



Types of Funds

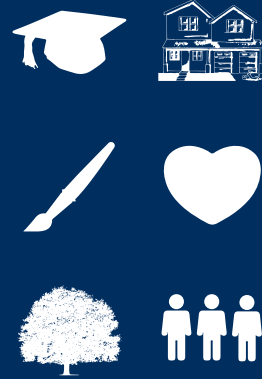
Donor Advised
For donors who wish to actively participate in grant-making

Donor Designated
For donors who wish to permanently designate grants to specific organizations

Scholarship
For donors who wish to support the educational needs of our community's youth

Field of Interest
For donors who wish to invest in an issue they care about

ways to support *your* interests



Maximize Your Return - Simply

The Community Foundation of Southern Indiana will tailor your fund to match your needs.

Whether your goals are to maximize and simply your giving, establish a corporate fund that can give anonymously, ease the tax burden when you sell your business, find a cost-effective alternative to establishing a private foundation or any other situation, we can help you do it. And we'll make it easy. We can accept gifts that many other nonprofits are unable to handle.

Our professional and knowledgeable staff will work with you and your advisor to ensure that you maximize your tax advantage and your positive impact on our community.

Ways to Give

The Community Foundation of Southern Indiana accepts a range of gifts, including:

- Stocks
- Bonds
- Real Estate
- Closely Held Assets
- Retirement Plan Assets
- Life Insurance
- Gifts from your Estate via Bequest or Will

For Additional Information



If you have additional questions or need more information please call Linda Speed, President and CEO of the Community Foundation of Southern Indiana.



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Community Foundation
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Ensuring generosity. Forever.™