



## WHAT IS ANONYMOUS GIVING?

The California Community Foundation (CCF) offers the option to give anonymously, if you so choose.

## WHO SHOULD CONSIDER ANONYMOUS GIVING?

Those who wish to protect their privacy, regardless of the reason.

## WHAT ARE THE BENEFITS OF ANONYMOUS GIVING?

- Flexibility that allows you to remain anonymous for some grants or be recognized for others
- Protect your privacy and that of your family
- Make an anonymous bequest to CCF or any other eligible nonprofit organization
- CCF does not publish your grantmaking history (unlike a private foundation)

## at a glance

### Anonymous Giving

- Protect your privacy
- Choose your level of anonymity
- Give anonymously or be recognized on a grant-by-grant basis

## HOW DOES ANONYMOUS GIVING WORK?

- 1 Establish level of anonymity** – When setting up a fund, donors can decide whether they want their name or their fund name to be anonymous. Donors also choose their communication preferences, such as including their fund name in CCF publications or on CCF's Web site. Donors can change their preferred level of anonymity at any time after creating a fund.
- 2 Recommend grants** – When recommending a grant, the donor specifies whether or not that grant will be anonymous.
- 3 Funds transferred** – CCF mails the grant checks from your fund directly to the nonprofit organization.
- 4 Correspondence goes through CCF** – All communications such as acknowledgment letters and receipts go through CCF. The acknowledgment letter that accompanies the grant check generally displays only the fund name, unless the donor requests not to do so. In addition, CCF doesn't disclose any personal information to any outside parties unless the donor wants to be acknowledged.

## CONSIDERATIONS

When CCF receives solicitations or inquiries based on your past grant recommendations, we will pass them along to you only at your request. Otherwise, all donors, whether anonymous or not, avoid excessive mail and solicitations from nonprofit organizations resulting from their gifts to CCF and prior grant recommendations.

# anonymous giving in **action**

An entrepreneurial husband and wife realized great business success during their career. They wanted to share their good fortune with the community, but also wanted to maintain their privacy. They considered establishing a private foundation to support their goals, but decided against it because they preferred to keep their grantmaking private, and private foundations are required by IRS regulations to publicly declare all grants.

The couple established a Donor Advised Fund at CCF that allowed them to remain anonymous in their giving. They also created a Scholarship Fund for local high school students and opted to make the scholarship awards public. This way, the couple enjoyed the flexibility on a grant-by-grant basis to be identified as the donor, while maintaining anonymity with respect to other gifts.

To learn more about **Anonymous Giving**, contact your Relationship Manager or Vice President of Development & Donor Relations Teresa Mosqueda at (213) 452-6298 or [tmosqueda@calfund.org](mailto:tmosqueda@calfund.org).

### IMPORTANT LEGAL DISCLOSURE

The information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice.

The California Community Foundation does not provide legal or tax advice. You should consult your tax advisor to properly determine the tax consequences of making a charitable gift to the California Community Foundation.

Contributions to the California Community Foundation represent irrevocable gifts subject to the legal and fiduciary control of the foundation's board of directors.

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