



WHAT IS A PHILANTHROPIC CONSULTATION?

The California Community Foundation (CCF) offers complimentary personalized philanthropic consultations to all CCF donors. Overseen by your dedicated Relationship Manager, consultations involve informative discussions and use CCF's team of experts to help identify grantmaking opportunities, establish giving goals or plans and involve family members in your giving.

WHO SHOULD CONSIDER A PHILANTHROPIC CONSULTATION?

A philanthropic consultation can benefit donors of all levels of experience – from those just starting out to long-time givers – and assist donors in their areas of interest.

WHAT ARE THE BENEFITS OF A PHILANTHROPIC CONSULTATION?

- Create the change you envision by exploring and fulfilling philanthropic goals as you work with CCF's team of experts
- Maximize your giving's impact by establishing or refining a strategic giving plan tailored to your philanthropic goals
- Identify new and emerging giving opportunities that align with your interests and passions so giving can be meaningful to you
- Involve your family in your giving

at a glance

Philanthropic Consultation

- Benefit from personalized consultations tailored to your situation and objectives
- Maximize the impact of your philanthropy by developing a strategic giving plan
- Get guidance and insight on best practices from CCF's team of experts

HOW DOES A PHILANTHROPIC CONSULTATION WORK?

- 1 Schedule** – Donors contact their dedicated Relationship Manager to schedule a consultation.
- 2 Discuss** – CCF's team of experts, which can include programmatic staff, listens to the donors to understand their unique goals as well as their objectives and works with them on making their giving more meaningful.
- 3 Deliver** – CCF presents the donors with personalized guidance based on their objectives.

CONSIDERATIONS

While CCF offers donors tailored philanthropic consultations, it is important to note that this advice applies specifically to a particular donor's situation and objectives. The same strategies may not be appropriate for other donors.

philanthropic consulting in **action**

A donor designated his daughter as the successor advisor to his Donor Advised Fund. When the daughter became the fund's advisor, she was unsure of how to give, but wanted to maintain her father's giving vision and create a sustainable legacy in his memory.

CCF provided guidance on identifying new organizations that aligned with her father's passion for the arts and educated her on best practices. By working with CCF she was able to identify local arts organizations and create a giving schedule that maintains the value of the fund while providing a number of capacity building grants each year. The fund now lives on as a tribute to her father and effectively supports each organization's ability to grow.

To arrange a **Philanthropic Consultation**, contact your dedicated Relationship Manager or Vice President of Development & Donor Relations Teresa Mosqueda at (213) 452-6298 or 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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SERPC0818