



CASE STUDY: FAMILY PHILANTHROPY

Family Defines Its Giving Across Generations, Interests and Time Zones

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Leveraging Grantmaking Experts

Throughout the entire process, a dedicated CCF team of industry experts were available to answer additional questions and served as thought partners as the family explored their areas of interest. CCF's program officers, who have specialized knowledge, hosted a call with individual family members regarding the issues that concerned them.

Based on those calls, the CCF team was able to identify specific nonprofits with unique approaches to improve education, health and the environment.

Next, the nonprofit selection was clarified by establishing a series of criteria defined in conjunction with CCF. For example, the family was committed to ensuring any nonprofit receiving funds was sustainable and offered services on a national or global scale.

We're adept at developing a plan to honor every member of the family.

A family that gives together shares their values, strengthens bonds and creates memories that last a lifetime. Our giving experts can work with your clients to ensure their children and grandchildren create a tradition of impact.

Making Informed Choices Based on Best in Class Nonprofit Research and Analysis

To give the family total confidence in their grantmaking choices, CCF provided extensive, detailed background information and analysis on each potential nonprofit.

Grounded in a six-month process of research and refinement, the CCF team provided a finalized list of suggestions to the entire family. Ultimately, the family agreed on funding an initial group of organizations that honored the variety of interests and social concerns of each family member.

By creating the family run donor advised fund, CCF helped them discover the joy of giving through the support of the foundation's comprehensive suite of charitable services. What was once considered a difficult process has been simplified. Today, the entire family looks forward to the next teleconference call or group chat to confidently plan out their next round of grants.

When it comes to the special and personal considerations that arise with family philanthropy, we're adept at developing a plan to honor every member of the family – including opportunities for new generations to engage in charitable endeavors now and succession plans for family funds into the future.

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Please feel free to contact your Relationship Manager or the Donor Relations Team at donorrelations@calfund.org if you have any questions. We are here to help.

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