



WHAT ARE FAMILY PHILANTHROPY SERVICES?

CCF works with you to involve current and future generations in your philanthropy to make the giving experience more fulfilling. By listening to donors and understanding their needs and interests, CCF can introduce giving to younger generations, while engaging current generations and enriching philanthropy for the entire family.

WHO SHOULD CONSIDER FAMILY PHILANTHROPY SERVICES?

Donors who wish to involve their family in their philanthropy and create a lasting impact on future generations.

WHAT ARE THE BENEFITS OF A FAMILY PHILANTHROPY CONSULTATION?

- Introduces the concept of giving to future generations and makes the giving experience more meaningful for the entire family
- Addresses how to develop a fund succession plan that will help create a lasting family legacy and ensure your giving vision will be realized
- Provides tips on how to instill a sense of giving back to your young and adult children by involving them in a collective giving plan

at a glance

Family Philanthropy Services

- Enriches your giving through a collaborative effort whose impact spans generations
- Introduces the concept of giving to family members of all ages
- Helps to develop a fund succession plan and create a lasting family legacy

HOW DOES A FAMILY PHILANTHROPY CONSULTATION WORK?

- 1 Schedule** – Donors contact their Relationship Manager to schedule a family philanthropy consultation.
- 2 Consult** – CCF's team of experts meets with the donors to understand their families' needs and goals.
- 3 Recommend** – CCF team presents the donors with personalized recommendations on how to involve their families in their giving.
- 4 Review** – Donors and CCF work together to revise their family plans as the donors' families grow and their members' interests evolve over time.

CONSIDERATIONS

CCF recognizes that all families are unique and have different needs. Therefore, our recommendations are tailored to address each family's issues and goals and are not meant as a general recommendation for all families.

family philanthropy in **action**

An established businessman worked with CCF to set up a Supporting Organization (also known as a Private Foundation Alternative Fund) to facilitate his giving. As part of his estate plan, the donor asked CCF to help him engage his two adult daughters to continue his philanthropic vision and establish his legacy.

CCF worked with the family members to create a custom-made giving plan that provided an educational opportunity for the daughters and maintained the vision of their father. Using proceeds from the Supporting Organization, the businessman established a Donor Advised Fund for each daughter to pave the way for their respective giving. CCF also created a succession plan that would allow the daughters to seamlessly carry on their father's giving after his death.

To arrange a **Family Philanthropy** consultation, contact your 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.

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