What is the Sartori Circle?
- The Sartori Circle is the new identity of the CCF Legacy Society.
- It is a community of donors who have entrusted CCF with the responsibility of ensuring that their philanthropic and legacy goals are achieved long beyond their lifetimes.
- Members partner with CCF by designating it as a beneficiary of their will or trust, creating a life-income gift (charitable gift annuities and charitable trusts) with CCF, and/or by designating CCF to serve as the successor advisor to their existing Donor Advised Fund.
- Currently, CCF’s Sartori Circle is made up of 238 legacy relationships, more than one-half of whom have committed to supporting Los Angeles-based nonprofit organizations through their legacy gifts.

Why was the Legacy Society renamed the Sartori Circle?
- The new identity reflects Joseph Sartori’s robust civic engagement and the impact of his legacy gift that has uplifted the Greater Los Angeles area for seven (7) decades. In addition, the new name serves to link the impact of his initial legacy gift to the impactful legacies of past, current and future Sartori Circle members.

Who was Joseph Sartori?
- Joseph Sartori was a banker, businessman, philanthropist and community leader whose passion is still changing lives, 160 years after his birth.
- Born in 1858 in Cedar Falls, Iowa, to German immigrants, he eventually settled in Monrovia, where he established the First National Bank of Monrovia, and when Monrovia was incorporated, Sartori was elected as the city’s first Treasurer.
- In 1888, he and his wife relocated to Los Angeles, where he established Security Savings Bank, and soon expanded the organization into the Security Savings Bank and Trust Company.
- Sartori was a highly-respected business and community leader:
  - Co-founded the industrial community of Torrance
  - Instrumental in building the Biltmore Hotel and developing the Los Angeles Civic Center
  - Instrumental in establishing UCLA and the Los Angeles Country Club
- One of Sartori’s most important civic contribution was establishing CCF in 1915.
  - Sartori learned of concept from Frederic Goff, who created the first community foundation, the Cleveland Foundation, as an effective way to manage charitable bequests. Joseph Sartori saw that the community foundation model could help wealthy people in Los Angeles serve the public good by pooling their small trusts and bequests into one large trust a bank.
  - Originally called the Los Angeles Community Foundation, it was the third community foundation established in the United States and in 2019 is the 11th largest by assets.
  - As a final act of civic leadership, Sartori made an extraordinary legacy gift when he passed away in 1946, by making a bequest gift of $1 million dollars to CCF. The Joseph F. and Margaret R. Sartori Fund demonstrated the Sartori’s investment in the Los Angeles community and remained CCF’s largest unrestricted gift for 40 years.
That fund, which has grown over the years from interest and appreciation, is still making a great impact on Los Angeles today. Since 1998, it has granted over $2 million dollars to support local organizations.

Why would donors want to join the Sartori Circle?
- Our Sartori Circle members have joined for several different reasons; including,
  - CCF’s ability to ensure donor’s legacy intentions are fulfilled in perpetuity by exercising its variance power when designated nonprofits are no longer operable or issue areas are no longer relevant.
  - CCF’s expert philanthropic consultation services that can help donors craft their legacy mission statement and legacy plans.
  - CCF’s expertise and knowledge related to the issues.
  - CCF’s demonstrated financial stewardship of donors’ philanthropic investments enabling funds to grow over time.
  - CCF’s ability to accept gifts of complex assets and convert those assets into philanthropic dollars.
  - CCF’s ability to provide non-profit research services to ensure that legacy gifts will reach the most impactful nonprofit organizations.
  - CCF’s ability to facilitate family philanthropy into their legacy success.
  - CCF’s ability to convene Sartori Circle members to foster connections between forward thinking individuals who are committed to using their charitable resources to support causes and organizations well into the future.

How do prospects and donors join the Sartori Circle?
- Inform CCF staff that they’ve included CCF in their Will or Trust.
- Inform their Relationship Manager that they’d like for CCF to serve as successor advisor of their existing Donor Advised Fund.
- Complete a Sartori Circle Membership Form or a Letter of Testamentary Intent, which will provide CCF with important information related to the source, anticipated amount and purpose of their legacy gift.

What are the benefits associated with Sartori Circle membership?
- Recognition of Sartori Circle members in printed materials (i.e. Annual Report, Newsletters, Donor Wall Listing).
- Invitations to Sartori Circle Events – Allows members and their family members to connect and learn from other similarly-committed donors who want to make a meaningful long-term impact.
- Access to CCF experts to help develop Personalized Giving Plans.
- Guidance by CCF experts in beneficial ways to integrate charitable giving into the donor’s estate plans.

What information/materials are available to help me inspire others to join the Sartori Circle?
- Sartori Circle FAQs One-Sheet
- Sartori Circle – Guide to Gift Planning Brochure
- Sample Language for Making a Charitable Bequest (Information donors can provide their attorneys to include their legacy intentions into their estate plans.)