



The Community Foundation of the Florida Keys....

Is a nonprofit organization dedicated to helping our donors make a positive impact on their community.

One of the key strengths is **SAFEGUARDING** donors' gifts and preserving their charitable intent.

If you would like to learn more about how we safeguard our donors' charitable gifts and create lasting philanthropic legacies, please give us a call at 305-292-1502.

Due Diligence

- Investment & Finance Committee
- Creates prudent investment policies
- Oversees fund Investment Managers
- Regularly reviews fund performance

Thoughtful Guidance

Local community leaders create sound policies and oversee the foundation's operations.

Preserving Donor Intent

The Foundation ensures the original intent of the donor's gift is preserved forever.

Account Protection

Investment of funds is managed by Mason Investment Advisory Services, Inc., a firm with a proven approach and strong track record.

All assets are held by a third-party custodian, TD Ameritrade, a leading global provider. This provides independent security of fund balances.

Independent Reviews

Annual Audit by an independent CPA firm.

Ensuring Compliance

For all fund distributions, the Foundation verifies that the beneficiary is a public charity under Section 501(c)(3) of the Internal Revenue code.

