

HOW TO MAKE A GIFT

Decide When to Give

Give when it's convenient to you: Now, with a gift to the **Foundation Society**, **Future Fund** or **create a named fund**; or Join the **Legacy Society** with a gift through your will or estate plan.

Decide What to Give

The Community Foundation can accept almost any type of appreciated asset as the basis for your fund. For example, cash, stocks, bonds, real estate or other assets can be accepted as contributions to your fund.

Choose the Name for Your Fund

Use your name, a family name or you can choose anonymity while naming your fund.

Choose a Type of Fund

- ❖ **DONOR ADVISED FUND** – You participate in the use of your gift. Aided by our professional staff, you identify how the resources of your Donor Advised Fund should be used.
- ❖ **UNRESTRICTED FUND** – You allow the Foundation Board to determine the best use of your fund. The flexibility provided by your Unrestricted Fund allows the Foundation to respond to the ever-changing needs of our community ... today and tomorrow.
- ❖ **SCHOLARSHIP FUND** – You determine the criteria that students must reach to receive a scholarship from your fund.
- ❖ **DESIGNATED FUND** – You direct your Designated Fund to benefit a specific purpose or nonprofit organization.
- ❖ **FIELD OF INTEREST FUND** – Your gift is pooled with the gifts of other donors in the fund to maximize impact. The Foundation Board sets the criteria for the grants from these funds. You receive recognition of your gift during the year it is received.
- ❖ **NONPROFIT ENDOWMENT FUND** – Leaders of nonprofit organizations can select the Community Foundation to hold their organization's endowment. The Community Foundation offers skilled management of these funds, which enables nonprofit organizations to have a constant source of funds to provide ongoing income to or respond to emergency needs.
- ❖ **LEGACY PROGRAM – LEGACY SOCIETY** – To be remembered by acts of giving after one's lifetime is indeed an honor. Through your will or life insurance policy you can benefit your community well into the future. As a member of our Legacy Society you can express your wishes today and know with confidence that they will be honored by the Foundation.

See Reverse side for gifting instructions.

CFFK is a tax-exempt 501(c)(3) organization – EIN #65-0648968

**We're here to help. There are more online tools for donors and professional advisors at CFFK.org.
Contact Jennifer McComb at 305-292-1502 or email jmccomb@cffk.org to get started.**

How to Make a Gift Now

CASH – Cash may be hand delivered to the office at 300 Southard St., Suite 201, Key West FL 33040.

CHECKS – All checks must be made payable to “The Community Foundation of the Florida Keys”, or “CFFK”, with notation in the memo section or on accompanying documentation indicating if the gift is an unrestricted gift to CFFK or with the name of the program or Fund/Endowment under CFFK management. Please send or deliver checks to the office, 300 Southard St., Suite 201, Key West FL 33040. Gifts may also be made online at www.cffk.org.

WIRE TRANSFER FOR CASH – Please alert CFFK 24 hours before a wire transfer is placed so we can respond in a timely manner.

Bank Name: First National Bank of Omaha, 1620 Dodge St., Omaha, NE 68154

ABA Number: 104 000 016

Account Name: TD Ameritrade, Inc., 200 S. 108th Ave., Omaha, NE 68154

Account Number: 16424641

For further credit to: Community Foundation of the Florida Keys

Account Number: 931030073 Holding Account

SECURITY TRANSFER – (i.e. stocks, bonds and mutual funds) – Please alert CFFK 24 hours before you transfer a security. Please be advised that CFFK does NOT hold individual stocks in our investment pool; stocks are immediately sold which typically takes a minimum of 3 business days to settle. After the stocks are sold and CFFK receives the confirmation from our investment account, CFFK sends an acknowledgement letter to the Donor for their tax records. The value of the Donor’s gift is the average of the high and low on the day of transfer. The proceeds from the sale of the stocks are allocated according to the Donor’s instructions; i.e., unrestricted or designated to a program or named Fund/Endowment.

Have your broker transfer the security to:

Holding Company: TD Ameritrade

DTC No.: 0188

Account Number: 931030073, Community Foundation of the Florida Keys, EIN #65-0648968

NOTE: If you hold a negotiable stock certificate, please call us for further instruction on how to transfer that certificate/stock to CFFK.

How to Make a Planned Gift through Your Will or Estate Plan

UNRESTRICTED GIFT - Simply name “The Community Foundation of the Florida Keys” as the beneficiary in your will or estate plan in whatever amount you feel appropriate.

GIFT TO AN EXISTING FUND - If you want your gift to go into an existing Fund at the Community Foundation (e.g., The Florida Keys Future Fund):
Please name that specific Fund in your will or estate plan with a designated amount. For example: ***“To the Community Foundation of the Florida Keys for further credit to the Florida Keys Future Fund.”*** (Visit cffk.org for a complete list of existing funds.)

CREATE AN ENDOWMENT - If you want your gift to be used to create an Endowment to distribute a percentage of its earnings annually for a specific Field of Interest(s) and/or to specific organizations you want to support other than CFFK:

Please contact CFFK and we will meet with you to execute a separate document called a Fund Agreement, which outlines the specific amounts, recipients and purposes in order to accomplish your charitable wishes. Donors may make changes to the Fund Agreement at any time in the future without any additional expense.

All Donors notifying us of their intent to make a gift the Community Foundation through their wills or estate plans automatically become honored members of CFFK’s Legacy Society.