

COMMUNITY FOUNDATION OF THE FLORIDA KEYS

HOW TO MAKE A GIFT

Decide When to Give

Give when it's convenient to you: Now, with a gift to the **Florida Keys Future Fund**, supporting our annual grants **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, to add to any one of our 190+ existing funds, or as a pass-through gift to support one or more nonprofit organizations. The Foundation accepts publicly traded stocks and bonds, real estate, art and other assets.

Choose the Name for Your Fund

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

Choose a Type of Fund

- ❖ **DONOR ADVISED FUND** – You participate in the use of your gift. Contributions can be made in the years where it is most tax-advantageous to the donor. Distributions to nonprofits can be made at your convenience. Guidance is available from our professional staff who are knowledgeable about local nonprofits.
- ❖ **CORPORATE FUND** – Businesses can give to nonprofit organizations through donor advised funds to create maximum public awareness or to support causes with anonymity.
- ❖ **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 for individuals to receive scholarships from your fund.
- ❖ **DESIGNATED FUND** – You direct your fund to benefit one more specific nonprofit organizations.
- ❖ **FIELD OF INTEREST FUND** – You direct your fund to support one or more specific causes.
- ❖ **NONPROFIT FUND** – Leaders of nonprofit organizations can select the Community Foundation to hold short-term savings or permanent funds for the benefit of their organizations. The Community Foundation offers skilled management of these funds, to provide ongoing income to or respond to emergency needs.
- ❖ **LEGACY SOCIETY** – To be remembered by acts of giving after one's lifetime is an honor. You can give to one or multiple causes through your will, retirement fund or life insurance policy. You can create a legacy fund to express your wishes today and know with confidence that they will be honored by the Foundation.

See next page for gifting instructions

**The Community Foundation of the Florida Keys is a tax-exempt 501(c)(3) organization
EIN #65-0648968**

Key West and Lower Keys: contact Jennifer McComb at 305-809-4991 or jen@cffk.org
Upper and Middle Keys: contact Elizabeth Brown at 305-809-4995 or elizabeth@cffk.org

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 – Please make checks 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 or with the name of the program or fund. Please send or deliver checks to the office at 300 Southard St., Suite 201, Key West FL 33040.

CREDIT CARD – Gifts may be made online at www.cffk.org/donate.

WIRE TRANSFER – Please alert Foundation staff at cffk@cffk.org or 305-292-1592 before a wire transfer so we can properly acknowledge you as a donor and ensure your donation is credited to the correct fund or purpose.

Bank Name:	Citibank NA
Bank Address:	399 Park Ave, New York, NY 10022
Routing Number:	021000089
Account Name:	Charles Schwab Co. Inc.
Account Number:	4055-3953
For the benefit of:	Community Foundation of the Florida Keys
For final credit to:	2728-8228

SECURITY TRANSFER – (stocks, bonds and mutual funds) – Please alert the Foundation staff at cffk@cffk.org or 305-292-1592 so we can recognize the donor and ensure your donation is credited to the correct fund(s) or nonprofit(s). The securities will be immediately sold, typically settling the following business day. The Foundation will send an acknowledgement letter to the donor for your tax records. The fair market value of the gift is the mean between the highest and lowest quoted selling prices on the gift date (the date that the securities were received in our account).

Have your broker transfer the securities to:

Holding Company:	Charles Schwab
DTC No.:	0164
Account Number/Name:	2728-8228/Community Foundation of the Florida Keys Stock Donation

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

UNRESTRICTED GIFT - Simply name **The Community Foundation of the Florida Keys** as a beneficiary in your will or estate plan in whatever amount you feel appropriate. You can also name the Foundation as the beneficiary of your retirement fund or life insurance policy.

GIFT TO AN EXISTING FUND - If you want your gift to go into an **existing Fund at the Community Foundation**, 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 a permanent endowment fund** 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 the Community Foundation of Florida Keys, please contact the Community Foundation for a separate document called a Fund Agreement. The agreement outlines the specific amounts, recipients and purposes in order to accomplish your charitable wishes. Creating a fund is at no cost to the donor and there is also no cost to make changes to the fund agreement over the coming years.

All Donors notifying us of their intent to make a gift the Community Foundation through their will or estate plans become honored members of the Foundation’s *Legacy Society*. Learn more at cffk.org/legacy.