

The background features a large, vibrant orange circle in the center. Surrounding this central circle are several abstract, colorful shapes: a blue semi-circle in the top-left, an orange semi-circle below it, a yellow teardrop shape to the left, a green semi-circle in the bottom-left, a yellow semi-circle at the bottom, a green teardrop shape in the top-right, a yellow semi-circle in the top-right, a blue semi-circle in the middle-right, and a green semi-circle in the bottom-right.

Community, Connection & Charitable Impact

Today's Agenda

- 1 What is a Community Foundation?
- 2 Planned and Legacy Giving
- 3 Stories of Charitable Impact
- 4 Questions



What's a Community Foundation?

Grantmaking public charities that help to **improve lives** in their communities.

Each year, community foundations give over **\$5 billion to support nonprofits** in areas like education, health, the environment, and disaster relief.

1,030+ community foundations across the U.S., serving both urban and rural areas, and holding assets ranging from \$100K to over \$1.7 billion.



Meet Our Team



42 Years

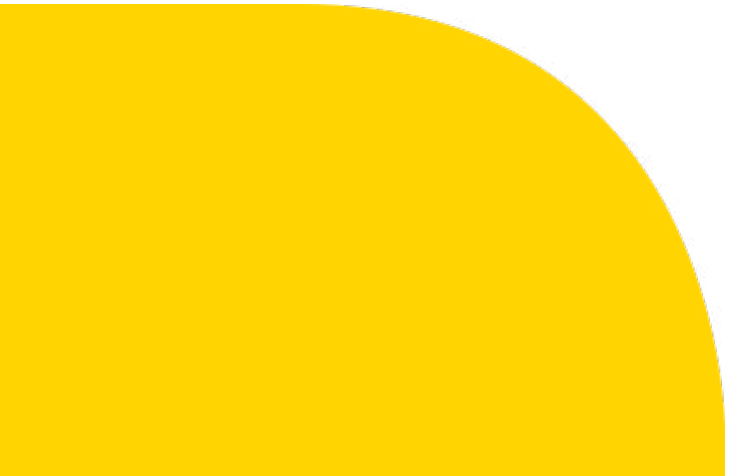
Founded in 1983

\$300+ million

Given away since inception

\$209 million

assets under management





60%

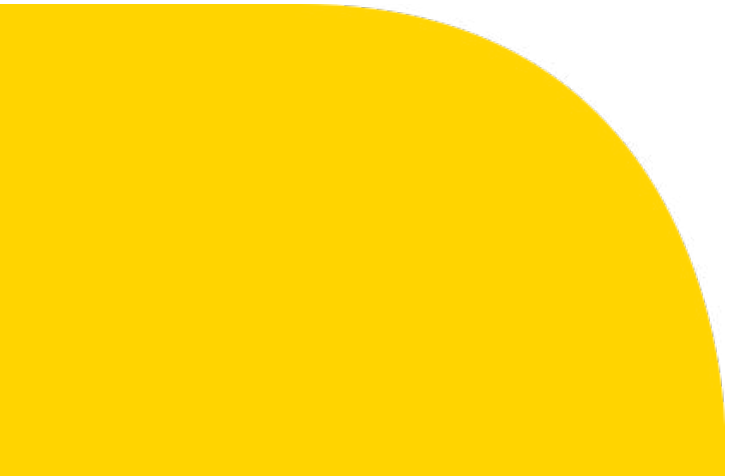
of CFSC's funds are Donor Advised (DAFs)

\$13+ million

dollars granted out from our DAFs in 2024

473

charitable funds managed by CFSC





Deirdre Holbrook

Vice President for
Philanthropic Advancement



Susan Price

Senior Philanthropic
Advisor



Rebecca Rogoway

Philanthropic Advisor



Olivia Loes

Philanthropic Advisor



Kirsten Etherington

Philanthropy &
Grants Associate



Daniel Moskowitz

Philanthropy Assistant

Our work is
guided by our
team mission
statement.

We **build community** among
changemakers and help design
and **aggregate philanthropy**
for strategic and long-term
impact in order to create a
community where all people,
have the **resources and**
opportunities needed to thrive.

We offer donors:



Philanthropic
Planning Services



Legacy Giving
Planning



Education &
Community

For you & your client

Local Expertise: Deep knowledge of community needs and nonprofit organizations.

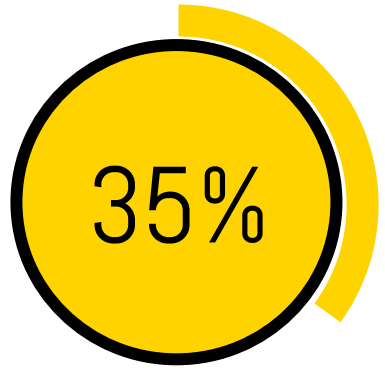
Long -Term Stewardship: Ensures funds continue supporting causes for generations.

Administrative Support: Handles grant distribution, compliance, and reporting.

Flexible Giving Options: Allows for immediate or deferred gifts through DAFs and estate plans.



Community Impact



Restricted
Discretionary
Funds



Community
Partnership



Stewardship of
Donor's Intent



\$5.9 Million
Granted in 2024

Basic Human Needs	————	\$1.35M to over 50 orgs in 2025
Homelessness	————	Supporting shelter services
Foster Youth	————	Supporting orgs serving foster youth
Mental Health	————	\$500,000 with Sutter Health
Resilience Fund	————	\$20M+ granted since 2017
Fund for Belonging	————	Supporting immigrant communities
Resilient Organizations	————	Nonprofit training and support program

**Have you
worked with
charitable
giving?**





\$42.68 billion

Giving by bequests in 2023*

39%

Individuals between ages 45 -65 left a bequest in a will**

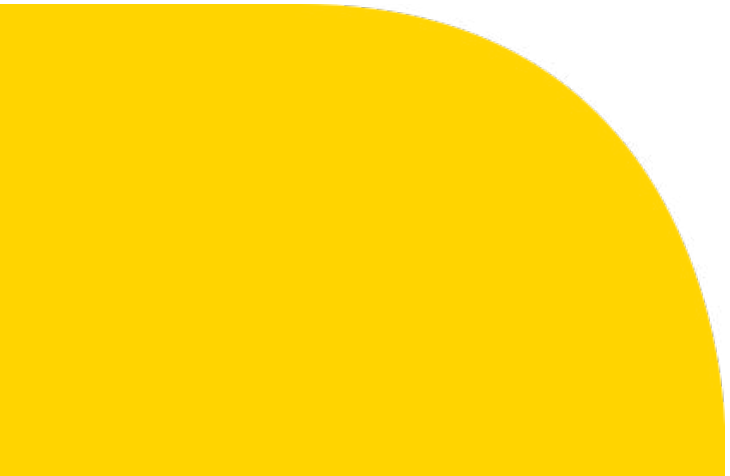
23.4%

Will give more if estate tax is eliminated***

* From Giving USA's 2024 Annual Report

** From FreeWill's 2023 Planned Giving Report

*** From Bank of America and Lilly School of Philanthropy's 2023 Study of Philanthropy: Charitable Giving by Affluent Households



**Planned
Giving**

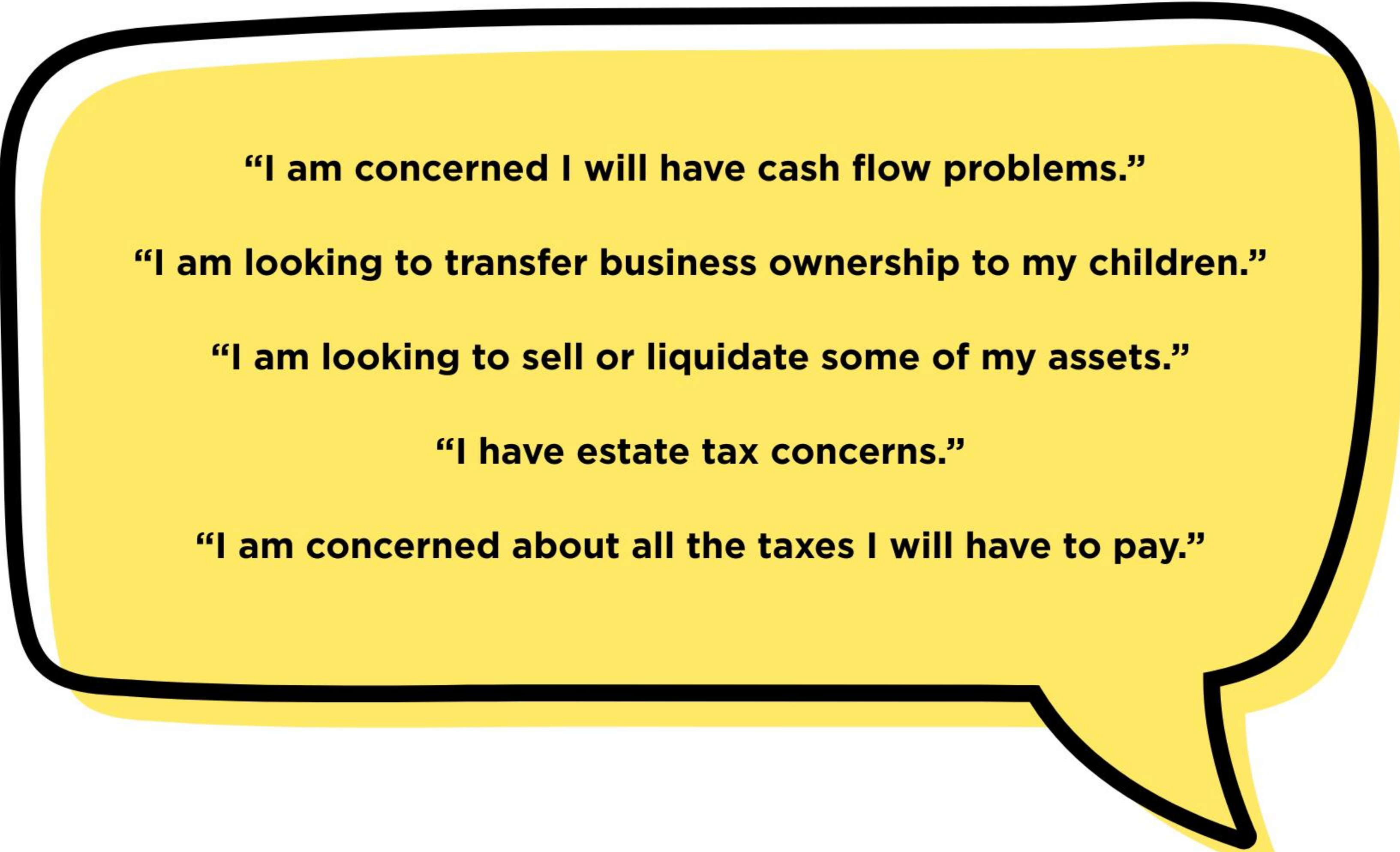
**Legacy
Giving**

Benefits of Planned Giving

- Integrates charitable giving with financial, tax, and estate planning
- Expands giving beyond cash
- Maximizes tax efficiency and preserves wealth
- Offers lifetime income options
- Supports complex planning goals, especially the transition of wealth and assets
- Encourages long-term client retention

Who are Planned Givers?

- Individuals with appreciated assets like stock or real estate
- Those approaching or over age 70½
- Longtime, consistent supporters of an organization
- Business owners planning a sale or transition
- People without children or direct heirs
- Grandparents who want to support future generations (e.g., education)



“I am concerned I will have cash flow problems.”

“I am looking to transfer business ownership to my children.”

“I am looking to sell or liquidate some of my assets.”

“I have estate tax concerns.”

“I am concerned about all the taxes I will have to pay.”

Planned Gift Agreement

Formal Agreement: how charitable estate will be used

Instructions and Framework : allows flexibility

Adapting Needs: revocable, evolving community needs and their own.

Elements:

- ✓ philanthropic intent and priorities
- ✓ nonprofit beneficiaries and focus areas
- ✓ gift structure
- ✓ distribution and management



Benefits of Legacy Giving

- Help clients leave a lasting legacy
- Enables high-impact giving without affecting lifetime finances
- Simple to implement
- Flexible and customizable
- Can reduce estate taxes
- Encourages multi-generational engagement

Unique Legacy Services



Stewardship
of a donor's
legacy into
the future



Deep
knowledge
of the
nonprofit
community



Legacy
Society is a
community
of change
makers

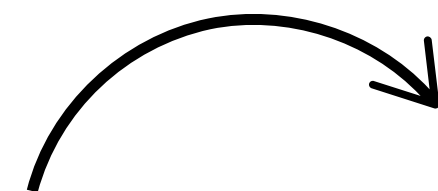
Donor Intent is our
north star, regardless of
the changing nonprofit
landscape,
organizational changes,
or emergent community
needs.

**We are their
advocates when they
are no longer with us.**

Designated
Funds

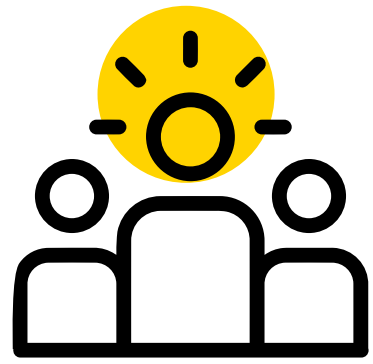
Restricted
Discretionary
Funds

Next Gen
DAFs



Some of our favorite
legacy giving tools

Philanthropic Goal Setting for Greatest Impact



Clarify Priorities &
Values



Determine Giving
Capacity



Select Giving Vehicles



Engage Family & Heirs



“All good men and women must take responsibility to create legacies that will take the next generation to a level we could only imagine.” - Jim Rohn

The Largest Bequest in Sonoma County History

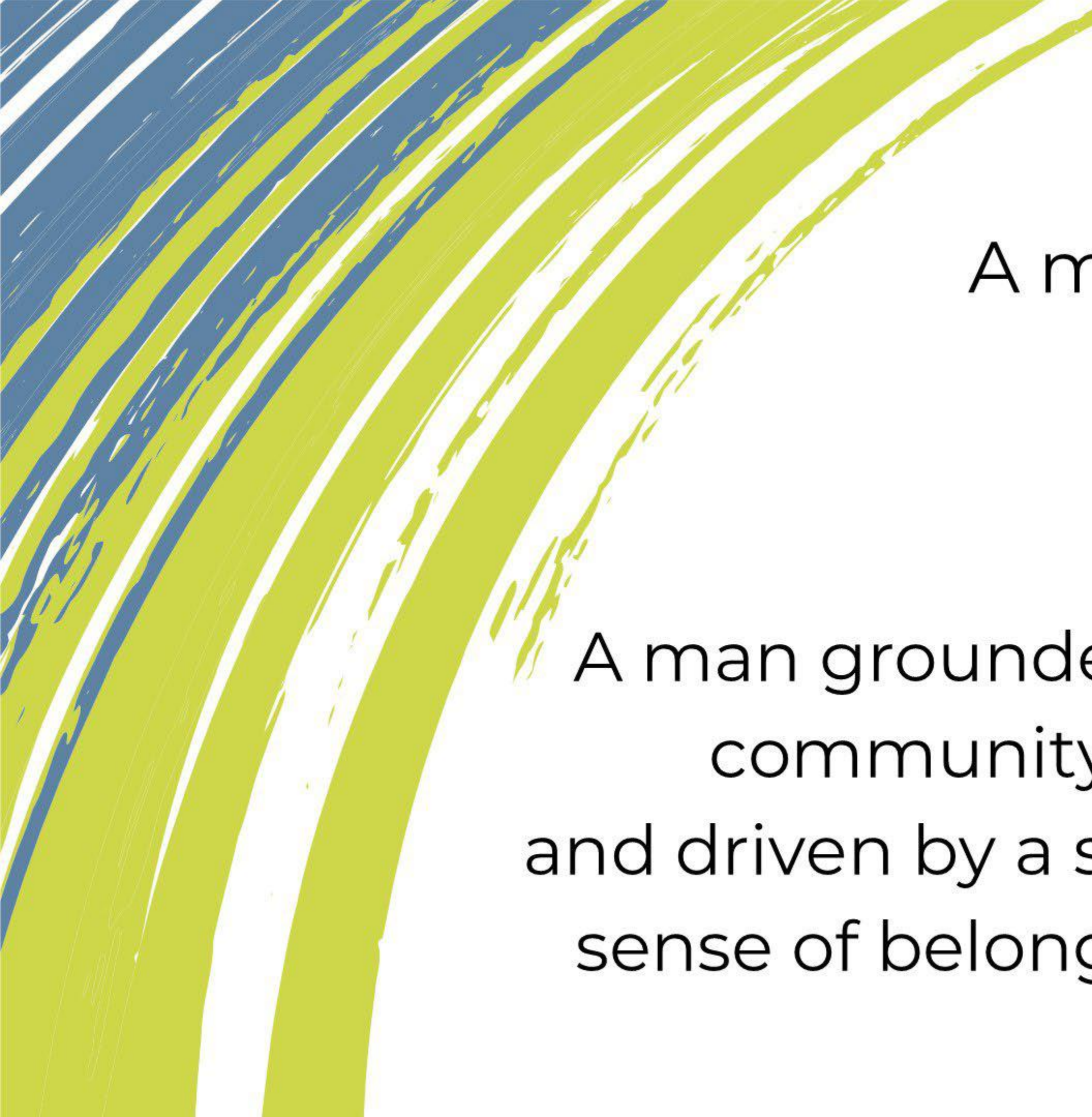
- Charles “Chop” DeMeo
- \$16 million in 1985
- Supported two passions: “the well being of young people in Santa Rosa and homeless mothers with children”
- ½ endowment, generating income in perpetuity
- Established a legacy that improves the lives of our community and will keep Charles DeMeo’s memory alive for generations

**CONNECT, ENGAGE,
DISCOVER!**

dhops
Teen Club

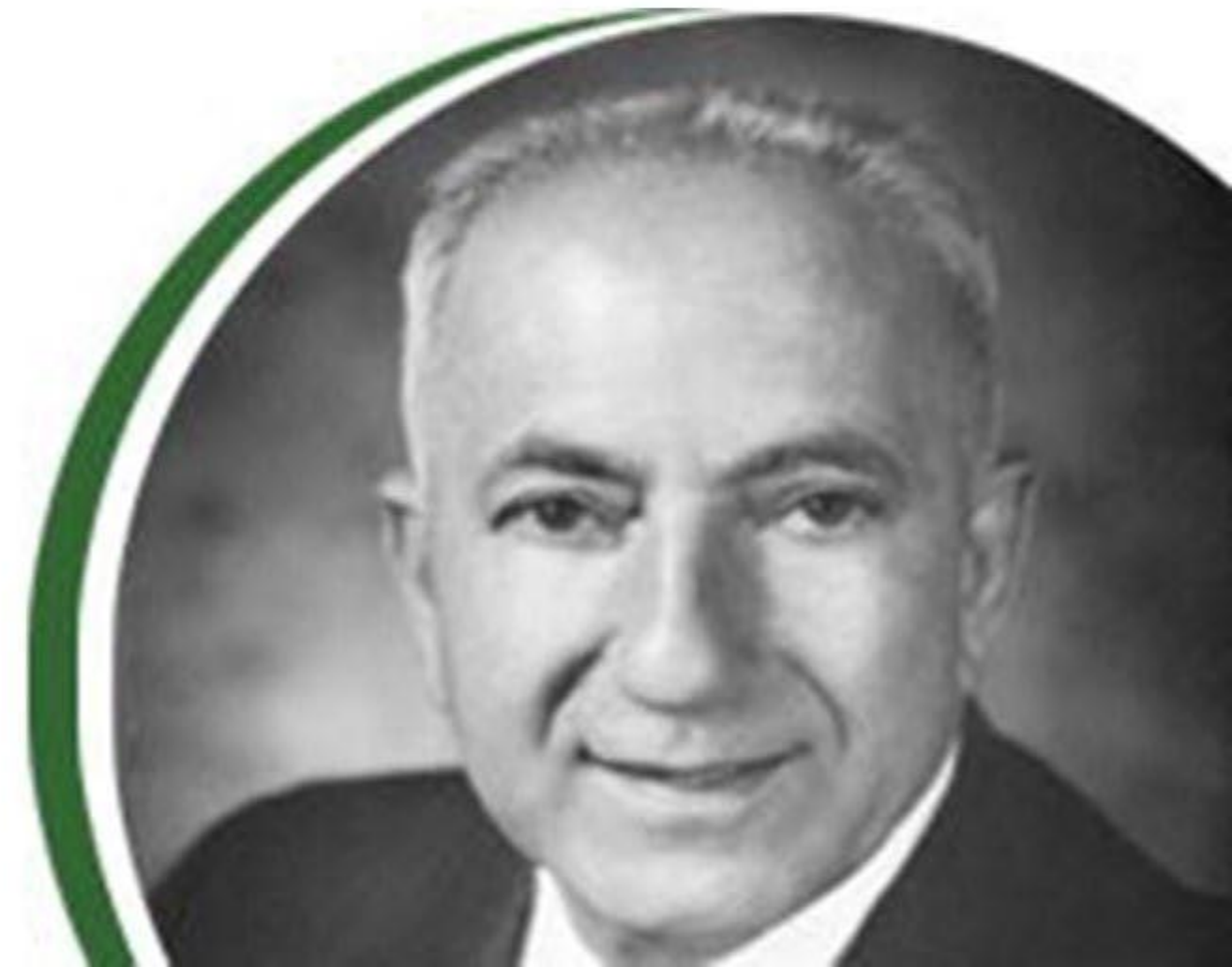
**24 YEARS!
SERVING OVER 20,00
TEENS SO FAR!**





A man from humble
beginings

A man grounded in
community
and driven by a strong
sense of belonging.



Our Mission:

"To provide a safe, fun and productive place where teens can engage, connect and discover their true potential."
(Adopted 2012)



Core Values

In 2006 Chop's adopts 3 of the Search Institutes 40 Developmental Assets as the foundation of it's Core Values:

01

Providing Caring Relationships



02

Setting High Expectations



03

Opportunities for Future



Art



College &
Career



Culinary



Leadership



Music



Night
Club &
Cafe



Sports &
Fitness



Tech-
nology

More than a place to hang out

- Youth Convening
- Teens Helping Kids
- Mental Health Advocates
- Community Connectors





Emily

Harvard



Brennie

UCLA



Alana

Dartmouth



Grace

Stanford



Anna

Northwestern

Where are they now?



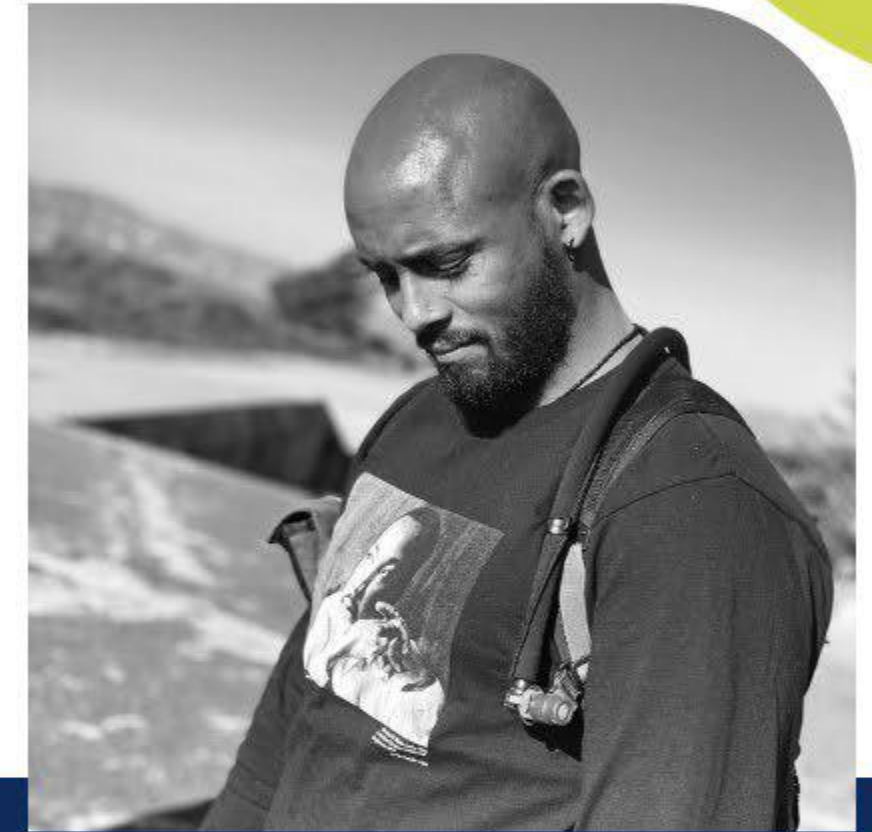
Kenneth

Kenny is a Program Director for a Sacramento based organization with a focus on providing resources for African American families .



Eric

Eric went on to the military and from there started a successful journey in Cyber Security. Eric attributes his passion and success in technology starting with his time spent in Chop's Tech Lounge



Johnny

Johnny currently works in Home Health Care. Providing financial help to his family. He continues to be involved in Chop's events and activities where possible.



To Learn More About Chop's

*Check us out
here*



The Power of Planned Giving

1 Why Legacy Gifts Matter:

Strengthens the donor's lasting impact on their community.

Provides sustainable funding for nonprofits.

Can inspire future generations to engage in philanthropy.

2 Real-World Examples of Transformational Gifts:

Bequests that have built entire nonprofit organizations.

Endowments that continue to fund community initiatives.

Scholarships that have supported students for decades.

3 Community Foundations Serve Your Clients:

Provide long -term stewardship of a donor's gift, for generations.

Adapt to changing community needs.

Exceptional asset management and local knowledge, guided by donor intent.

Thank you!

We're so grateful to share with you today.

Please visit sonomacf.org to learn more about our services. You can ask questions and receive support for your clients by emailing us at sprice@sonomacf.org.

Join our Professional Advisor Network to be added to our referrals list and receive invitations to future gatherings.

