

**TOTAL ASSETS:**

**\$17,525,091**

Info as of: February 28, 2018

**THE CHARITABLE GIVING ACCOUNT**

**GIVE**

TO YOUR ACCOUNT AND RECEIVE A TAX DEDUCTION



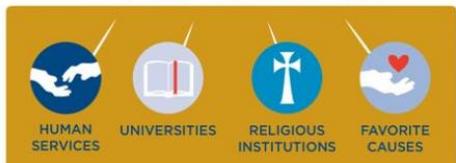
**GROW**

YOUR CHARITABLE DOLLARS BY INVESTING



**GRANT**

TO YOUR FAVORITE 501(C)(3) PUBLIC CHARITIES AT YOUR CONVENIENCE



**Martin County Community Foundation works with philanthropists to establish funds to impact communities here and around the globe.**

**ESTABLISHED:** The Martin County Community Foundation has been helping donors realize their philanthropic goals since 1988. Over nearly three decades, the Community Foundation has awarded millions in grants to hundreds of nonprofits agencies and academic institutions, locally and globally.

**PROFESSIONAL:** Benefiting from the oversight of top wealth management, legal, and philanthropic experts in our community, MCCF has an ten-member Board of Directors, six Emeritus Board Members and a staff of two dedicated professionals. The Community Foundation also works in concert with professional investment teams (including wealth management professionals, estate planning attorneys, and tax advisors).

**TAX ADVANTAGED:** The Martin County Community Foundation is a public charity so donors receive the maximum tax deduction allowed by law and avoid capital gains tax.

**TRUSTED:** Generous donors, such as the Trustees of the Frances Langford Foundation, choose to rely on the expertise of MCCF to help oversee their funds. The professional staff and advisors monitor the standards and performance of the grant-supported agencies, programs and projects, whether they are located locally, nationally, or internationally.

**EFFECTIVE:** The Community Foundation is committed to working with donors, community partners, and nonprofit organizations to build strong and sustainable service delivery systems and vibrant, healthy communities. The professional staff and board members have deep knowledge of the charitable landscape and can provide information and insight regarding an agency’s vision, impact, and viability.

**PERSONALIZED SERVICE:** MCCF staff works with the donors as closely or independently as preferred. Some donors rely on MCCF to help find the charity that is the right fit for their giving goals. Others come to the Foundation knowing exactly where to focus their giving. Every donor who becomes a fund holder will find peace of mind through regular quarterly reports and access to performance assessments of the charities they support.

**BROAD REACH AND IMPACT:** There are currently 42 individual funds overseen by the Martin County Community Foundation, focusing on causes as varied as public art, emergency food and housing, health, animal protection, the environment, elder care and others. MCCF honors the charitable goals of each donor and works to develop an individualized, creative partnership that will create a lasting legacy.

*Our Wealth Advisor Partners can continue to manage their clients' assets and meet their clients' tax and charitable goals.*

## A Win-Win for You and Your Clients

**To create a significant and positive impact for your clients' charitable causes, you can:**

- \* Continue to manage the assets contributed by your clients on your firm's investment platform
- \* Convert non-managed client assets such as real estate, closely held interests, businesses, personal property and art into charitable dollars that you could then manage
- \* Offer clients the benefits of a private foundation without all the administrative expenses
- \* Offer clients a value-added service by connecting them to some of the best charitable giving products and services on the market

## Identifying Clients Who Qualify

**Clients who may be ideal candidates might:**

- \* Be in a "transition" phase of life - empty nest, retirement, or estate planning
- \* Have highly appreciated assets they are reluctant to sell due to capital gains tax exposure
- \* Be planning to sell their private company
- \* Want a tax deduction at the time of the initial contribution rather than when distributions are made
- \* Appreciate that there is no annual giving requirement imposed by the IRS
- \* Desire a buffer between them and the charitable organizations seeking their support
- \* Want to engage their children in the tradition of charity through intergenerational giving
- \* Want to grow their contributions tax-free over time
- \* Have a desire to give something back to their community

## Your Resource

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