

FFTC: Your Partners in Philanthropy

A charitable giving toolkit for professional advisors

FOUNDATION for the CAROLINAS

We're here to help

You are your clients' trusted expert in estate planning, financial planning, tax planning and more, and you've built lasting relationships because you listen to their needs and help them meet their goals.

We can be a valuable resource for your charitably-minded client who wants to make a lasting difference in their community – now or in the future. As your local community foundation, Foundation for the Carolinas can help you help your clients make their unique charitable visions a reality.

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Overview of FFTC's charitable fund management

Your clients have unique needs. Perhaps they are a retired couple that wants to give to nonprofits through their estate. Or they are business owners who are considering selling – and want to make an impact in their communities when they do so. Your clients may sit on a nonprofit board and want to improve the organization's financial sustainability – or perhaps you advise a nonprofit client that needs help accepting a gift of real property.

In all of these cases, FFTC can help.

Our team of philanthropic advisors can help your clients achieve their charitable goals and determine the right types of giving funds and services to accomplish their vision. Whenever that vision includes competitive grantmaking or scholarship programs, our philanthropic advisors can administer these types of programs and manage boards and committees.

Assets held in charitable funds are typically invested in one of FFTC's standard investment pools, depending on the goals and risk tolerance of your clients. If your client wishes for you to manage how their charitable funds are invested – and they meet the fund minimum – you can participate in our Investment Alliance Manager Program and serve as an advisor to the fund.

Products and services overview

Client Type	Product	Description
Individuals, Families, Businesses	**Donor Advised Fund**	Offers your clients a flexible, efficient way to manage giving with superior tax advantages. Gifts can be made with a variety of assets and create an immediate tax deduction. Donors can then determine how and when to recommend grants to nonprofits.
	Designated Fund	Supports the good work of a specific nonprofit your clients designate, often in perpetuity.
	Scholarship Fund	Supports students by providing grants for educational purposes and give your clients the ability to specify an academic discipline, institution or eligibility criteria.
	Field of Interest Fund	Your client's support allows FFTC to address the needs of a specific area of community life or geography and ensure that their charitable vision remains relevant over time.
	Community Impact Fund	Your clients can provide permanent, strategic support for vital causes in our community by entrusting a gift to an endowed fund that aligns with their values. These funds leverage FFTC's grantmaking expertise and knowledge of local issues to make strategic investments in our community's future.
Individuals, Families	**Charitable Trust** *(such as charitable remainder trusts and charitable lead trusts)*	Carefully planned, efficient ways for income and assets to be distributed over time to your clients, their beneficiaries and designated charitable organizations.
Nonprofit Organizations	**Agency Fund**	A cost-effective, long-term vehicle that gives nonprofits a way to sustain their good work while leveraging FFTC's endowment management, investment and financial services.

Client Type	Service	Description
Individuals, Families, Businesses	**Gifts of Business Interests**	Allows your clients to give interests in LLCs, limited partnerships or closely held corporations, thereby supporting the causes they value and reducing their tax liability while retaining control of their business.
	Gifts of Real Property	Allows owners and investors to make gifts of real estate, thereby supporting the causes they value while taking advantage of substantial tax benefits.
	Private Philanthropic Services	Custom support of the unique needs of large funds, subsidiary foundations and private foundations.
Individuals	**Planned Giving**	Helps your clients positively impact the future by planning today for a tax-advantaged gift after their lifetime.

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Products and services for individuals and families

FFTC Donor Advised Funds

Donor Advised Funds offer your clients a flexible, efficient way to manage giving with superior tax advantages.

- A single contribution to your client's fund can be granted to as many organizations as you choose throughout the lifetime of the fund.
- FFTC Donor Advised Funds have no start-up costs, ongoing reporting or payout requirements.
- Contributions can be made with a wide variety of assets, and each contribution creates an immediate tax deduction.
- Variety of options for succession planning, such as naming a successor advisor, distributing funds to nonprofits or transferring assets to an FFTC Community Impact Fund.

FFTC Designated Funds

Designated Funds support the good work of the nonprofits your clients designate, often in perpetuity.

- Grants are distributed from the fund annually and your client can view the fund activity at any time.



The Power of Generosity

Bank of America executive Kieth Cockrell learned the power of generosity from his grandmother. She raised him while working, living with diabetes, and frequently helping others – despite their own limited resources. When Kieth and his wife, Serena, began their own philanthropic journey, one of the first causes they supported was the American Diabetes Association in honor of his grandmother.

Since then, they've expanded their charitable giving to other nonprofits, including those supporting education and the arts. To simplify giving and maximize impact, they opened a donor advised fund at the Foundation. They also affiliated their FFTC Donor Advised Fund with Foundation For Black Philanthropy to highlight the power of Black philanthropy and join a network of others who share a common vision for empowering Black communities.

"My wife and I have been the beneficiaries of a lot of support from many people over the course of our lives," he explained. "We are trying to support others who are just behind us on this journey."

Private philanthropic services

FFTC Private Philanthropy Services

Private Philanthropy Services support the unique needs of large funds, supporting organizations and private foundations. We can help with:

- Philanthropic strategy
- Grantmaking implementation and evaluation
- Governance and succession planning
- Finance, investment and accounting

We offer these services for donor advised funds, field of interest funds, supporting organizations and private foundations.

FFTC Supporting Organizations

Supporting Organizations are established as separate tax-exempt entities, governed by their own boards with support and oversight from FFTC and strengthened by FFTC grantmaking and endowment management services. They have access to a broad custom investment platform with the tax benefits of a public charity. This is an excellent alternative to a private foundation – with only a fraction of the administrative responsibilities.



Nish Jamgotch Humanitarian Fund



Nish Jamgotch Jr.

The son of Armenian immigrants, the late Nish Jamgotch Jr. became an expert in the ways the United States and Soviet Union cooperated to reduce the threat of nuclear conflict. Although he was a political science professor at UNC Charlotte for 25 years, he was much more than a professor. He was also an advocate for bettering the human condition through collaboration and innovation.

When he wanted to launch an award that recognizes humanitarian efforts and that encourages cooperative problem solving, he turned to Foundation For The Carolinas as "professional administrators of philanthropy." Through an FFTC Field of Interest Fund, the Nish Jamgotch Jr. Humanitarian Award is announced annually, recognizing local community leaders – such as Sil Ganzó of ourBRIDGE for KIDS and Adrienne Threat of Hope Vibes – for their creative visions and impact.

Left: Sil Ganzó, 2020 Nish Jamgotch Jr. Humanitarian Award recipient

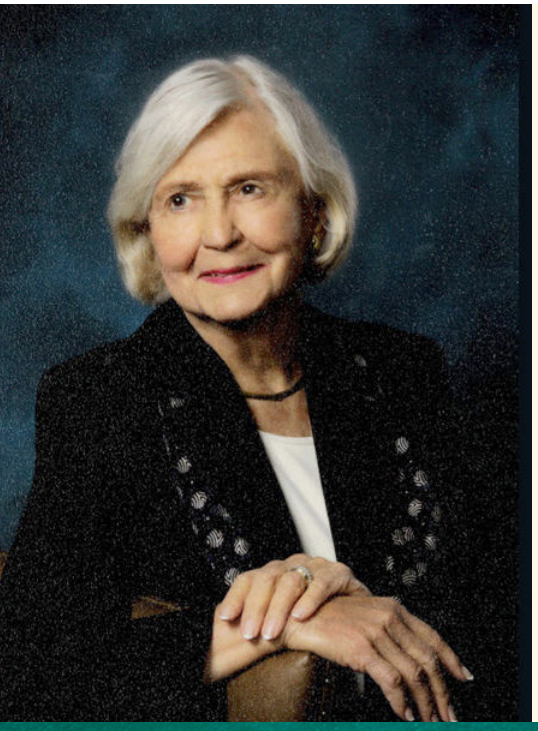
Products and services for individuals and families

- **Planned Giving**
  Planned Giving at FFTC lets your clients positively impact their community after their lifetime with a charitable gift through their estate, trust or retirement accounts. Whether their goal is to address evolving community needs, support their favorite nonprofits in perpetuity or engage their family in the experience of philanthropy, FFTC makes it easy and efficient to create an enduring legacy.

- **FFTC Charitable Trusts**
  Charitable Trusts, such as charitable remainder trusts and charitable lead trusts, are carefully planned, efficient ways for income and assets to be distributed over time to your clients, their beneficiaries and designated charitable organizations.

- **FFTC Field of Interest Funds**
  Field of Interest Funds deploy your clients' gift relying on FFTC's knowledge of our region and nonprofits to address the needs of a specific area of community life or geography and ensure that their charitable vision remains relevant over time.

- **FFTC Community Impact Funds**
  Community Impact Funds provide permanent, strategic support for vital causes in our region. Your clients can entrust a gift to an endowed fund that awards grants to specific cause areas that align with their values, leveraging FFTC's grantmaking expertise and knowledge of local issues to make impactful investments in our community's future.



Quiet Leader, Remarkable Legacy

Janet Wilson was a longtime Caldwell County civic leader. She was especially passionate about education, serving on the local school board and on state-level agencies for decades.

She was introduced to FFTC by her estate planning attorney. With the Foundation's help, she developed a charitable vision: she wanted every child in Caldwell County to have access to free pre-K education. And with her tenacity and a transformative philanthropic investment, she made it happen.

Janet opened an anonymous fund at the Foundation with annual distributions from charitable lead trusts and established a planned gift to ensure the impact would continue past her lifetime. The fund grew to support a pre-K program across Caldwell's elementary schools. Beyond the financial investment, Janet's expertise and drive helped shape the program, which is earning a national reputation as a leader in pre-K education.

Janet passed away in March 2020, but her little-known impact on students, teachers and her community continues to be far-reaching.

Scholarships

FFTC Scholarship Funds support students by providing grants for educational purposes and give your clients the ability to specify an academic discipline, institution or eligibility criteria.

FFTC Comprehensive Scholarships

The comprehensive service provides a full-service approach for managing the entire scholarship process. In addition to the services provided for Core Scholarships, the Foundation publicizes the scholarship, evaluates and assigns preliminary scores for application, provides administrative support to the selection committee, arranges meetings and coordinates applicant interviews, if applicable.

FFTC Core Scholarships

Our basic level of scholarships include developing scholarship guidelines and selection criteria (in consultation with the donor), recruiting and appointing scholarship selection committee members, providing monthly statements and grant history, hosting application and scholarship materials on our platform, screening applicants for eligibility and paying scholarship grants to educational institutions.



Scholarships Rooted in Family and Community

Honoring her roots is a central theme in Ione Rucker Jamison's life. Inspired by their mother's use of produce from the family garden for their hair care growing up, she and her sister Ellen co-founded the natural hair care company Rucker Roots.

Ione also established the Rucker Education Scholarship Fund at FFTC in honor of her paternal grandparents, who were educators in Lancaster, SC, during segregation. Her grandfather was instrumental in integrating the schools there (A.R. Middle School is named for him). The fund, which supports first generation college students who attended A.R. Middle School, has awarded more than $35,000 in scholarships since it was created.

"I'm so grateful for the Foundation. The earnings from the fund allows us to award scholarships each year, and the team is always there to support us," said Ione.

Solutions for gifts of complex assets

FFTC Gifts of Business Interests

Your clients can give interests in LLCs, limited partnerships or closely held corporations to support the causes and nonprofits they value and reduce their tax liability while retaining control of their business. Our subsidiary, Community Investments Foundation, accepts gifts of closely held business interests valued at $250,000 or above.

How it works



FFTC Gifts of Real Property

Owners and investors can make gifts of real estate to support causes and nonprofits they value, maximizing charitable impact while taking advantage of substantial tax benefits. Community Real Property Holdings accepts gifts of real property with a minimum appraised value of $250,000.

How it works





Philanthropy is Serious Business

Matt Magan, co-founder of the private equity firm Ten Oaks Group, has made a number of gifts of closely held business interests, each representing investments in underlying private equity funds. These gifts were made prior to sale, allowing for a charitable income tax deduction and the reduction or elimination of subsequent capital gains. Once liquidated, the proceeds will be distributed to his FFTC donor advised fund to support a variety of causes, including CLTRising, a tutoring and college preparatory nonprofit for high-achieving, low-income students that was founded by Matt and his wife Elizabeth.

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Products and services for companies

FFTC Corporate Donor Advised Funds

Corporate Donor Advised Funds can be used to manage a company's giving while helping your client meet other business goals:

- FFTC Donor Advised Funds, our signature funds, are flexible and efficient ways to manage giving with superior tax advantages.
- Executive Donor Advised Funds demonstrate your company's commitment to giving back by providing philanthropic dollars that executives can direct for their own charitable giving.
- Employee Engagement Donor Advised Funds allow employees to be part of funding decisions, so they feel engaged and proud to be part of your charitable giving

Scholarship Funds

Provide the gift of education to deserving students, tailored to align with your company's priorities and brand. See page 8 for more information.

Community Impact Funds

Permanent, strategic support for general cause areas such as education, the environment, the arts or another that aligns with your company's values. See page 7 for more information.



TELUS Expands its Impact and Empowers North Carolina Youth

When TELUS — a Canadian-based technology company — expanded its reach in North Carolina, they wanted to broaden their philanthropic footprint across the state as well.

They established an FFTC Corporate Donor Advised Fund and committed to awarding $1 million in grants over four years. They will provide one-time grants of up to $10,000 each, supporting disadvantaged youth in North Carolina in areas of health, education and technology.

"Working with FFTC has enhanced this process by easing the administration of grant funding. This enables us to focus on building community relationships and deepening the engagement of our team," explained Bonita McClure, senior community investment manager.

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Products and services for nonprofits

Nonprofits strengthen our region, and we're committed to helping them thrive. We offer expert guidance and a wide array of solutions designed to ensure their financial sustainability.

FFTC Agency Funds are cost-effective, long-term vehicles that give nonprofits a way to sustain their good work while leveraging FFTC's endowment management, investment and financial services.

FFTC's comprehensive endowment management

- Distinct accounting for multiple funds
- Spendable income calculations
- Monthly fund statements and online access to fund information
- Advanced reporting capabilities
- Relationship support

Benefits of partnering with FFTC

- Cost-effective, diversified investment solutions
- Access to top quality investment managers and sophisticated investment options
- Portfolio oversight from FFTC Investment Committee and investment consultant
- Access to desirable asset strategies and share classes through FFTC's portfolio
- Your impact and mission can be shared with FFTC's individual and corporate fundholders

Other ways we help nonprofits throughout our region

- Complimentary meeting space during weekday business hours in our Uptown Charlotte headquarters to nonprofits located in our 13-county area.
- Networking events, educational workshops and resources – such as the Planned Giving Toolkit.
- Competitive grant programs. Visit fftc.org/grants for more information.

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Assets we accept

Type of Asset	Process
Cash	Clients can make a cash contribution by check, ACH or wire. Checks should be made payable to Foundation for the Carolinas and should include the fund name or other gift designation in the memo line. See asset delivery instructions.
Publicly traded securities	Your clients can leverage tax benefits and maximize charitable impact by gifting appreciated stock, which we liquidate upon receipt for the benefit of their charitable fund. They can transfer stocks to one of FFTC's several brokerage accounts offered for their convenience. See asset delivery instructions.
Mutual fund shares	Gifts of mutual fund shares may be required to be transferred directly to an FFTC account within the mutual fund company. Contact our Donor Operations team at 704.973.4529 or support@fftc.org to discuss the transfer.
Life insurance policies	Your clients can designate FFTC as the owner and beneficiary of the policy, or designate FFTC as beneficiary of its proceeds. Contact us at philanthropy@fftc.org for more information.
Retirement plan assets	Your clients can designate FFTC as the beneficiary of a portion or all of the assets held in a qualified retirement plan, such as a 401(k) or 403(b) account.
Individual retirement accounts	FFTC is a qualified beneficiary for a charitable distribution from your client's IRA. Direct up to $100,000* as a Qualified Charitable Distribution to an FFTC Designated Fund, FFTC Field of Interest Fund or to an FFTC Community Impact Fund. **Indexed for inflation; contact us at philanthropy@fftc.org for current amount allowed.*
Closely held business interests	By gifting interests in LLCs, limited partnerships or closely held corporations, your clients can support the causes they value and reduce their tax liability, all while retaining control of their business. Leverage FFTC's unique structure and experienced team to maximize gifts of business interests for philanthropic impact.
Real property	Your clients can support charitable causes and maximize their tax savings by gifting residential property, commercial real estate or undeveloped land. Assets are held in a subsidiary until liquidated for the benefit of a charitable fund.
Assets from external donor advised fund	If your client is sending money from a non-FFTC donor advised fund, more information may be required. Contact our Donor Operations team at 704.973.4529 or support@fftc.org.

Investment pools & performance

Foundation for the Carolinas offers a cost-effective, expertly managed investment platform designed to address the diverse needs and objectives of those we serve. Fund advisors can choose from a number of investment strategies to increase diversification, lower costs and gain access to top-quality managers. Together, we will leverage our expertise and sound financial management to maximize your client's investment in the community.

- **FFTC Investment Committee & Governing Board**
  The Investment Committee determines asset allocation and monitors market performance with the goal of achieving a return commensurate with the risk of the particular investment portfolio and manager strategy. Recommendations of the Investment Committee are presented to FFTC's Governing Board for review and approval.

- **FFTC Investment Consultant**
  FFTC retains an Investment Consultant, currently Marsh, specializing in institutional funds management to help guide the Investment Committee. The Investment Committee has delegated the responsibility for selecting, monitoring and terminating investment managers. Mercer is also responsible for reviewing and reporting investment performance across all FFTC standard pools to ensure long-term performance achieves the investment objectives of the different strategies.

- **Investment Staff**
  In addition to the Investment Consultant, FFTC's internal staff includes investment professionals who further assist the committee in monitoring all aspects of FFTC's investment portfolios.

FFTC Investment Pools

FFTC offers a robust array of investment options designed to match your fund objectives, time horizon and risk tolerance. Investment pool options are available based on the size and type of your fund. Visit fftc.org/investments for more information.



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Continue to be your clients' investment manager with the Alliance Manager Program

One of the benefits of opening a fund with FFTC is having access to sophisticated investment options. However, if your client prefers for you to continue to manage investments for their charitable funds – and their fund balance is greater than $250,000 – then they can take advantage of our Alliance Manager Program.

Pre-approval process to establish the relationship:

The FFTC Investment Committee must review and approve all Investment Alliance Managers.

- Provide Mercer and FFTC with the required information listed in Exhibit A of the Program Guide.
- Mercer will assess the firm's performance, investment philosophy, organizational structure, and other criteria it deems necessary.
- The FFTC Investment Committee will review Mercer's recommendation at its quarterly meeting.
- Once approved, FFTC Staff will meet with the manager to review the information reporting requirements.

Current approved firms are listed on our website at fftc.org/investments.

For more information, see our Investment Alliance Program Guide or email investments@fftc.org.




HELP YOUR CLIENTS REACH
THEIR CHARITABLE GOALS

Conversation starters

Your clients come to you for financial, legal and tax advice. Many often have a strong desire to give back to their communities but might not know where to begin. Often the greatest opportunities for giving occur when clients are making other major business, personal and financial decisions — considering a sale of real estate or other major assets, planning for retirement, estate planning or experiencing a financial windfall.

You are in the ideal position to help them make the decisions that are right for them. You can educate and guide your clients on options, while simultaneously protecting their interests.

It all starts with a conversation.

- What issues matter most to the client?
- If they could solve any problem, what would it be?
- What would they like to accomplish with their money that would be meaningful to them?
- What do they like about their community and how do they think the community could be improved?
- Do they currently spend time as a volunteer? Do they serve on any nonprofit boards?
- Are they making charitable gifts now that they would like to have continued after their death?



See our Strategic Giving Guidebook for more tips on identifying charitable goals.

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Products for unique priorities

FFTC Products for Giving						
Non-Endowed Donor Advised Fund	**Field of Interest Fund**	**Designated Fund**	**Scholarship Fund**	**Community Impact Fund**	**Endowed Fund (all fund types)**	**Planned Gift (all fund types)**
Maximum Flexibility	Specific Interest	Targeted Organization	Educational Purpose	Community Needs	Permanent Support	Future Impact
▸ Support broad charitable purposes ▸ 100% of principal available for grantmaking	▸ Benefit organizations that fall within a specific charitable category rather than a particular organization	▸ Benefit one or more specified charitable organizations	▸ Provide scholarships for K-12, undergraduate and graduate levels ▸ Donors may recommend an academic focus and eligibility criteria	▸ Give FFTC discretion to meet changing or unforeseen charitable needs in the communities it serves through unrestricted gifts	▸ Support broad charitable purposes ▸ Preserve and grow principal and grow in perpetuity ▸ Distribute the spendable amount annually for grantmaking	▸ Create a legacy for future generations by including philanthropy in your estate plans



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Discussing types of planned gifts with your clients

Asset Type	Method
Bequest	Gifts made in your client's will can be directed to create one or more new funds or contribute into existing funds at the Foundation, whether Donor Advised, Designated or Field of Interest. Gifts can also be received into one or more of FFTC's Community Impact Funds to give the Foundation discretion to address evolving needs in our region.
Retirement Assets	Your client can name FFTC as beneficiary of their retirement account, such as a 401(k) or 401(3)(b), to create or contribute to one or more funds. FFTC is an eligible nonprofit to receive a Qualified Charitable Contribution (QCD) from your client's IRA, if directed to a Designated, Field of Interest or Community Impact Fund. Donor Advised funds are not eligible to receive a QCD.
Real Estate	Your client can transfer all or a fraction of their interest in real estate to Community Real Property Holdings, a subsidiary of FFTC, thereby reducing capital gains tax on the subsequent sale of the real estate. Upon sale, the proceeds can create a fund for charitable giving to support causes and nonprofits the client values. See page 9 for more information.
Business Interests	All or a fractional interest in your clients' ownership in a business can be donated to Community Investment Foundation, a subsidiary of FFTC, until sale of the business or redemption of the interest. Typically, capital gains tax is reduced on the subsequent sale of the business. Upon sale, the proceeds can create a fund for charitable giving to support causes and nonprofits the client values. See page 9 for more information.
Life Insurance *(beneficiary)*	Your client can designate their FFTC fund as a beneficiary of a life insurance policy, either to receive all or a percentage of proceeds, as either the primary or contingent beneficiary.
Life Insurance *(transfer of policy)*	Ownership of a paid-in-full life insurance policy can be transferred to the Foundation while the insured individual is still living to create or contribute to one or more charitable funds at your client's (or the insured's) death. Contributions from your client to pay the annual premiums on the insurance are tax-deductible charitable gifts.
Charitable Trusts *(lifetime or testamentary)*	FFTC administers both charitable remainder trusts and charitable lead trusts that allow your client to benefit their community through an FFTC fund or funds while also providing for members of the client's family.

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To endow or not to endow

Your clients may have questions about whether they should endow a fund or not. This depends on their individual charitable goals. If they envision having a fund that lasts in perpetuity so the next generation can continue to support the community, then an endowment may be the right approach.

The purpose of an endowment is to create a permanent source of funding, providing dollars year after year. For a fund to exist in perpetuity, the principal is generally preserved, and grants are typically distributed from what is called the spendable or spending rate.

The spending rate – the percentage or stipulated amount which can be spent from an endowment each year – is set by the governing body of the endowment, whether that is a nonprofit board, university trustees or the managers of a financial institution. Nationally, most endowments pursue a target spending level of between 4% and 6% of the endowment's market value. The spending rate acts as a 'ceiling' on distributions; if annual income is greater than the spending rate, the retained income is invested with the principal to grow the endowment. Foundation for the Carolinas' Governing Board sets the spendable rate for endowed funds each year. For more information, contact our investments team at investments@fftc.org.

This doesn't mean, however, that only the income generated by an endowment can be spent while the principal must always be preserved. Under modern endowment law, spending from endowments can be based on a percentage of the total endowment value, rather than all of its income. And the strict preservation of the principal – the historic gift value – has been relaxed. North Carolina law allows flexibility in the spending of endowments based on seven factors outlined in UPMIFA – the Uniform Prudent Management of Institutional Funds Act – promulgated in 2009.

Power of Legacy



Lucille Puette Giles gave generously throughout her life to a variety of charitable causes. She capped her tradition of philanthropy with an extraordinary, unrestricted bequest of $35 million to Foundation For The Carolinas in 1996.

The endowed gift entrusts FFTC to honor Giles' legacy in perpetuity by addressing ever-changing needs and opportunities in our community.

To date, $59 million in grants have been awarded to nonprofits from the fund, while maintaining a current market value of more than $35 million.**

Gift of
$35M
$59M
in Grants

***As of November 2023*

Donor advised fund versus private foundation

Do you have a client considering opening a private foundation or looking for a better alternative? They may want to consider the advantages of an FFTC Donor Advised Fund.

Advantages of FFTC Donor Advised Funds

- Establish a fund with $10,000 or more and a variety of assets, including complex gifts such as real estate or closely held business interests.
- Avoid the legal and compliance requirements of a private foundation, including start-up costs, annual filing requirements, governance requirements and annual minimum payouts.
- Enjoy maximum tax advantages for contributions and maintain flexibility in distributions and investment options.
- Manage your account and recommend grants to nonprofits through our online portal, making giving easy and convenient.
- Make grants anonymously, if desired, and avoid the detailed public disclosures of a private foundation, which often generate unsolicited charitable requests.
- Open an FFTC Donor Advised Fund and test drive its flexibility and the Foundation's services as you maintain the private foundation and its philanthropic activities.

Common motivators for converting a private foundation to a donor advised fund:

- Management and reporting has become too demanding
- Burden of keeping up with government regulations
- High costs of maintaining the foundation
- Preference for anonymity
- Desire to qualify for larger tax deductions
- Increased access to grantmaking experts
- Aspiration to focus on philanthropy, rather than administration
- Difficulty meeting the annual 5% payout requirement

See more details in our giving vehicle comparison chart.

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Affiliating funds for an even larger impact

Foundation for the Carolinas serves a 13-county region in North & South Carolina. Many of our fundholders feel a strong connection with their hometowns and look for ways to give back to their local communities.

FFTC regional affiliates are a special category of funds that are tied to a geography. These are endowed grantmaking funds – with volunteers acting as boards of advisors – that provide grants to nonprofits within their local communities.

- Cabarrus County Community Foundation
- Cherokee County Community Foundation
- Cleveland County Community Foundation
- The Cole (Richmond County) Foundation
- Iredell County Community Foundation
- Lancaster County Community Foundation
- Lexington Area Community Foundation
- Lincoln County Community Foundation
- Salisbury-Rowan Community Foundation
- Stanly County Community Foundation
- Union County Community Foundation
- York County Community Foundation

Your clients can support these affiliate funds in a few ways:

- Donating to the endowment funds of the affiliate community foundation
- Joining the affiliate boards of advisors
- Affiliating their own fund with the local community they wish to support



Downtown Shelby, N.C. (Cleveland County Community Foundation)

What does it mean to affiliate a fund?

When your client affiliates their giving fund with a regional affiliate, a portion of their fees will be directed to the grantmaking endowment. They still have control over their own grantmaking, but the grant checks will include the affiliate's logo instead of FFTC's.

Connect with local communities by affiliating funds

Operating as an independent supporting organization, the Foundation for the Charlotte Jewish Community leverages the resources of FFTC to secure and manage long-term charitable resources, build community through collaboration, and strengthen Jewish life, religion and culture. FCJC manages the endowments of Charlotte's Jewish nonprofits and assists individuals and families with current and after-lifetime giving.

FCJC FOUNDATION for the CHARLOTTE JEWISH COMMUNITY
Inspiring Philanthropy. Building Community.
A supporting organization of Foundation For The Carolinas

FCJC helps clients by:

- Facilitating customized philanthropic planning for individuals and families
- Connecting the philanthropic intent of donors with the needs of the community
- Offering charitable solutions such as donor advised funds and gifts of business interests
- Providing nonprofits with endowment fund governance and management
- Serving as a philanthropic advisor and collaborating with the legal, tax and financial advisors of its clients
- Furnishing skilled endowment management with support from FFTC
- Enabling individual and families to "Give Jewishly" to both Jewish and non-Jewish public charities
- Distributing grants to provide financial stability for local Jewish organizations

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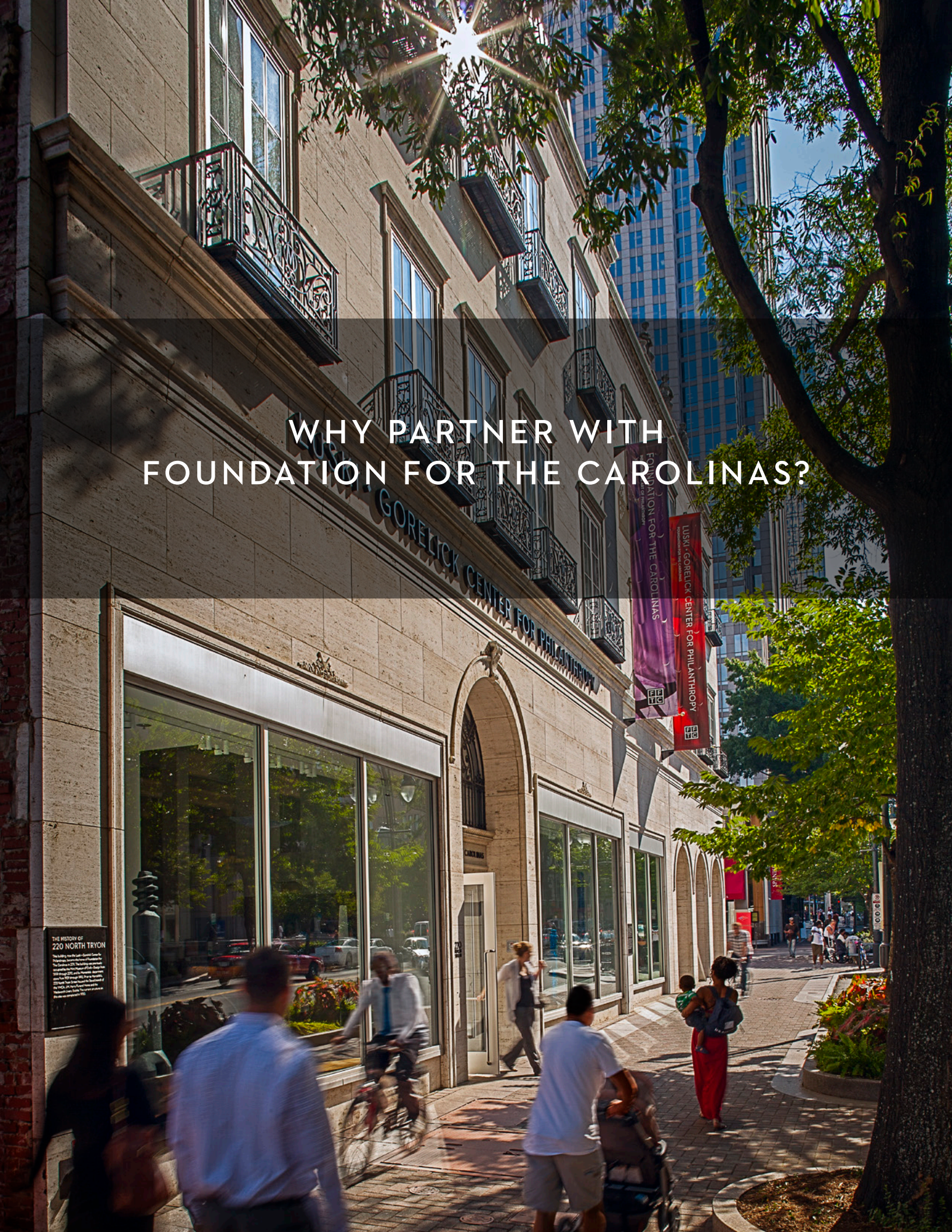
Foundation For Black Philanthropy is a collective power to celebrate and uplift the strong tradition of Black giving in our community.

FOUNDATION FOR Black Philanthropy

Originally called the African American Community Foundation, FFBP was made possible by planned gifts from Lethia Henderson and Elizabeth S. Randolph. Over the years, the volunteer grantmaking board has awarded more than $500,000 to nonprofits serving the local Black community.

Your clients can get involved in three ways:

- **Affiliating a fund:** By affiliating their fund with Foundation For Black Philanthropy, they will uplift and empower Black communities through philanthropy. Their grant awards will display the FFBP logo, highlighting the collective impact of Black philanthropists in our region.
- **Donating to the endowments:** Through the Lethia Henderson Fund for a Healthy Black Community and the Elizabeth S. Randolph Fund for Education and Prosperity, the volunteer grantmaking board awards grants to nonprofits serving the local Black community.
- **Networking:** FFBP offers a variety of educational and networking events throughout the year, where your client can connect with others with a similar vision.



WHY PARTNER WITH FOUNDATION FOR THE CAROLINAS?

What is a community foundation?

You've likely heard of family foundations like the Bill & Melinda Gates Foundation, or their corporate cousins such as the Ford or Walmart Foundations. These organizations were created with the wealth of the families or companies that run them, and the causes these foundations support are chosen by family members or the company.

By contrast, a community foundation is a collection of funds created by many residents of a city or region – and may include families, businesses and even nonprofits. Each of these "fundholders" can choose the causes or charities they want to support – such as establishing a scholarship fund or supporting a single nonprofit or a broader area of community need (such as the environment or animal welfare).

Many community foundations believe that, in addition to helping fundholders achieve their philanthropic goals, the foundation itself should address pressing issues in the region by building partnerships and encouraging generosity.

Foundation For The Carolinas is your community foundation.

Foundation for the Carolinas is the community foundation serving a 13-county region surrounding Charlotte. We work with charitably-minded individuals, businesses and nonprofits – and their advisors – throughout the region to maximize their impact in their local communities and beyond.

We inspire philanthropy and empower individuals to create a better community through:

- **Charitable fund management**
  We are a foundation made up of thousands of funds, most of which were opened by people, companies and nonprofits to maximize charitable impact. We accept a variety of assets as gifts into the funds, oversee the investment of the balances, and administer the payment of grants to recipients. Our team manages the funds based on the documented wishes of the donors or fund advisors.

- **Civic leadership and initiatives**
  Many of the important issues our community faces are broader than any one entity can address. Through the Robinson Center for Civic Leadership – our flagship program – we convene partners to address our region's greatest needs and opportunities, such as affordable housing, childhood literacy and economic opportunity.

- **Community building**
  We strive to bring people together. We offer educational webinars and events for partners to gather for conversation and fellowship. Our headquarters building is available for events and meetings, with the revenue allowing us to offer complimentary meeting space to nonprofits during weekday business hours. And we also allow fundholders to affiliate their funds with Foundation For Black Philanthropy or endowments in the 13 counties surrounding Charlotte, connecting donors to others with similar interests.

Civic leadership and initiatives

Many of the important issues our community faces are broader than any one entity can address. The Robinson Center for Civic Leadership convenes partners and funding to address our region's greatest needs and opportunities.

This important work is made possible through our administrative fees and generous donors who choose to gift discretionary dollars to fund FFTC's civic initiatives. In this way, your clients have the ability to make an even greater charitable impact by partnering with Foundation for the Carolinas.

Below are just a few of our initiatives over the years:

- **COVID-19 Response Fund**
  In partnership with the United Way of Central Carolinas, FFTC created the COVID-19 Response Fund in 2020. In total, more than $23.5 million was granted to 240 nonprofits helping those affected by the pandemic with basic needs such as childcare, education, housing, food, emergency financial assistance, health and mental health.
- **Leading on Opportunity**
  Leading on Opportunity uses strategy, policy and data to help partners across Charlotte-Mecklenburg solve complex social challenges that no single person or organization can tackle on their own, with the goal of improving economic mobility for all.
- **Read Charlotte**
  Read Charlotte is a collaborative, community-wide movement to double the percentage of third-grade students reading at grade level.
- **Veterans Bridge Home**
  Established in 2011, Veterans Bridge Home helps returning veterans and their families successfully transition from the military to the civilian sector in Charlotte-Mecklenburg in response to a rapidly growing veteran population. FFTC provided strategic planning assistance and resources to help launch VBH and to build a community network of support for veterans.
- **Carolina Thread Trail**
  A regional trail network that reaches 15 counties and more than 2.3 million people, the Carolina Thread Trail currently has more than 250 miles of trails and 100 miles of blueway open to the public.







Come together at Belk Place with your community foundation

Belk Place is a campus of civic amenities located in the heart of Uptown Charlotte. The campus includes the Luski-Gorelick Center for Philanthropy – which houses the Sonia and Isaac Luski Gallery, the Levine Conference Center, 220 North Tryon venues – as well as the Carolina Theatre.

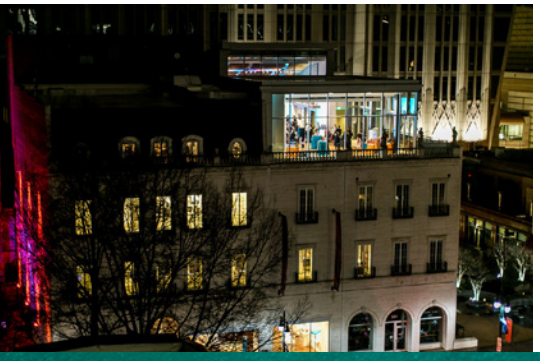
- **Luski-Gorelick Center for Philanthropy**
  Headquarters to Foundation for the Carolinas, the Luski-Gorelick Center for Philanthropy is a welcoming space for our community. We host hundreds of gatherings every year, offer free convening space for nonprofits and display a stunning art collection that is open to the public. Visit fftc.org/events for more information.

  220 North Tryon: 220 North Tryon is Uptown Charlotte's premier event venue. It offers unique, art-filled event spaces, including an art gallery, rooftop vertical garden, multiple board rooms and a solarium with stunning city views. Revenue from 220 North Tryon allows FFTC to provide complimentary meeting space to nonprofits.

  Levine Conference Center: The Levine Conference Center features 18 art-filled conference rooms, each designed to provide the perfect space for groups of various sizes to engage in meaningful conversation and planning. Rooms are available at no charge to our region's nonprofits during weekday business hours. Corporate and other private groups may rent space on weekdays, evenings and weekends.

  Sonia & Isaac Luski Gallery: Located on the first floor of our headquarters facility, the Sonia and Isaac Luski Gallery is a welcoming place for our community to enjoy art. The collection, most of which was donated by the Luskis, brings to life their philanthropic vision to share exquisite art with our community.

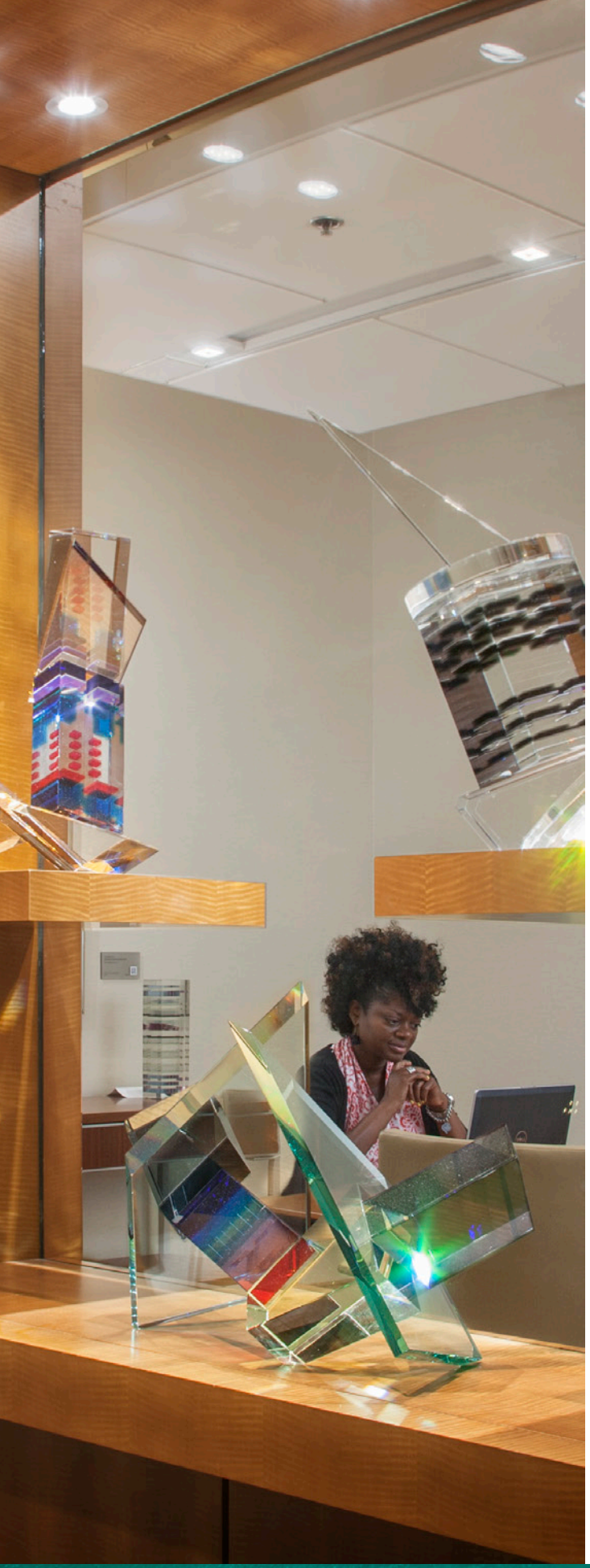
- **Carolina Theatre**
  Originally built in 1927, the Carolina Theatre at Belk Place has been lovingly restored to its original splendor and will serve as a dynamic civic hub. Programming at the theatre will include speakers, community engagement events, town hall meetings, arts and entertainment, films and more. Visit CarolinaTheatreCLT.org to learn more.







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