

# COMMUNITY FIRST FOUNDATION: AN ADVISOR'S TRUSTED PARTNER

Serving your clients with  
tax-advantaged charitable solutions

## Uniquely positioned to serve

Community First Foundation is ideally positioned to partner with you and your clients. As home of the nationally-recognized Colorado Gives Day program, we have established relationships with more than 2,300 Colorado nonprofits. With this broad knowledge and understanding of the nonprofit community, Community First Foundation is an outstanding resource to your clients who want to give more strategically.

## Customized charitable solutions

As a professional advisor, you understand each client's situation is different, and addressing their specific goals can be challenging. Community First Foundation offers a wide range of giving vehicles. More important, we work closely with you and your clients to identify the best options to meet their individual needs and charitable giving goals.

### You and your clients can choose from a variety of giving vehicles:

- **Donor-Advised Fund** – Offers great flexibility, immediate tax benefits and allows donors to give on their own timetables
- **Field of Interest Fund** – Makes an impact in a specific area of interest
- **Restricted Fund** – Directs giving towards specific nonprofit organizations
- **Endowed Fund** – Creates a fund that keeps on giving beyond a lifetime
- **Giving Circle** – Brings together donors in support of specific causes
- **Planned Giving** – Creates a charitable legacy using bequests, life income gifts, insurance, retirement assets, beneficiary designations and other planned giving options
- **Unrestricted Fund** – Endows a gift for donors who simply want to support the community and its ever-changing needs
- **ColoradoGives.org** – Provides comprehensive, objective and up-to-date information about nonprofits and is an easy way to donate online
- **Nonprofit Endowment Fund** – Enables organizations to achieve long-term sustainability through sound investments

## Donor-advised funds with impact

A donor-advised fund is an easy, powerful and highly flexible approach to charitable giving. A Community First Foundation donor-advised fund simplifies philanthropy by organizing charitable giving activities through one expertly managed, cost-effective vehicle.

### **At Community First Foundation, donor-advised fund benefits include:**

- Immediate tax deduction
- \$5,000 minimum to establish the fund
- Expert, professional investment management
- Low annual administrative fees
- Grantmaking to any United States-based nonprofit
- Administrative service and support
- Family philanthropy consultation
- 24/7 online access
- Fundraising pages available through [ColoradoGives.org](https://ColoradoGives.org)

## Charitable support and service

### **Community First Foundation supports you and your clients in every step of the charitable giving process. We help you:**

- Identify your clients' charitable giving interests and motivations
- Match personal charitable interests with tax planning needs
- Create and implement charitable plans that are integrated into business, personal and financial decisions
- Facilitate gifts of cash and securities, as well as complex assets, including real estate, closely held stock and mineral interests
- Provide information on community needs, nonprofit organizations and programs that make a difference in the charitable areas your clients care about most
- Deliver grantmaking expertise and a range of administrative services related to charitable giving

**POWERING**

**COMMUNITY**

**TOGETHER**

## About Community First Foundation

Since 1975, Community First Foundation has helped individuals, families, businesses and nonprofits come together to improve the quality of life and create positive change in Jefferson County, the Denver metropolitan area and beyond. With a deep understanding of the charitable community and a highly personalized level of service, we provide the support and resources to help create and implement charitable giving plans.

Signature programs include ColoradoGives, Colorado Gives Day, Kids for ColoradoGives and The Innovators Society.



A program of Community First Foundation



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## Learn More

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