

IDEAS FOR GIVING

Helping companies do good things for people

Providing the means to meet **community needs**.



Tagline Associates Inc. occupies the entire second floor of a modern office building on a busy city thoroughfare. This 20-year-old enterprise has earned its reputation as a good employer, good neighbor, and successful business. From its inception as a one-man firm to its current status as a regional leader with 100 employees, Tagline has already built a rich heritage as a community benefactor. “We always try to keep the door open here to good causes,” according to Richard Tagg, company founder and CEO.

The generosity of Tagline Associates takes many forms: pro bono work; gifts-in-kind; hours of volunteer effort by company associates; and, of course, cash donations. Although the company takes pride in its generosity, it has never found a way to be consistent with its donations. When the firm suffers a low-earnings year, for example, even favorite charities are turned away.

Last year was a very good year for Tagline, resulting in a bounty of funds available for charitable donations. At the firm’s annual retreat, employees asked if there might be a better, more consistent way to respond to the needs of their community... in good times and bad.

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Community foundations provide a simple, powerful, and highly personal approach to giving.

We offer a variety of giving tools to help businesses achieve their charitable goals. You can give cash, appreciated stocks, real estate, or other assets, and can receive maximum charitable and tax benefits. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact your local community foundation.



COMMUNITY
FOUNDATION
of South Lake



A community foundation is... a simple way to fulfill multiple charitable interests. Businesses can give through us to have an impact on a number of nonprofit organizations.

A Donor Advised Fund

provides the executives and employees of Tagline Associates a simple, flexible, and effective method for funding grant awards to meet critical local needs.



Setting goals and expectations. A committee of Tagline executives and associates was formed to investigate options and establish some basic guidelines for the company's giving program:

- **Simple.** Tagline employees should not have to devote long hours to charitable giving; the process must be smooth and efficient.
 - **Flexible.** Tagline should be able to give a variety of assets and recommend grants several times during the year.
 - **Effective.** Charitable giving should be targeted to where it is needed most in the community.
- In addition, there should be opportunities for business tax deductions; and capital gains tax avoidance on gifts of stock.

Setting things in motion. After discussing various giving options, the committee took a closer look at two choices: establishing a private foundation or a Donor Advised Fund at their community foundation. The choice was made after meeting with Tagline's attorney and professionals from their community foundation. After two brief working sessions, The Tagline Fund was established.

The community foundation's staff created a list of potential grant recipients in six categories of community need identified by Tagline's committee. Tagline's associates reduced the choices to recommendations. Soon the first grants from The Tagline Fund were on their way to local charities.

The company plans to grow The Tagline Fund through periodic gifts to their community foundation. The fund will provide an ongoing vehicle to support community needs in good times and bad, flexibility to change priorities from year to year, and enhanced pride for company employees—who take charitable giving personally.

There's so much more we'd like you to know. Your community foundation provides personalized service and a variety of giving vehicles. We welcome the opportunity to work with you and your advisor to fulfill your unique charitable objectives. This story represents a composite illustration drawn from the actual stories of many of the thousands of people who give through their community foundations.