

TOOLS FOR GIVING

Connecting personal values to high-impact opportunities

Field of Interest Fund



By establishing a Field of Interest Fund, you can target your gift to address needs in an important area of community life. Arts. AIDS. Aging. At-risk youth. Our board awards grants to community organizations and programs that are making a difference in the area you select. Your gift stays flexible enough to meet community needs in your interest area—even as they change over time.

How it works

- You identify an area of personal interest as broad or narrow as you wish.
- You make a gift to your community foundation during your lifetime or through a bequest in your will. You can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive tax benefits in the year your gift is made.
- Our professional program staff evaluates needs in your area of interest that would be most impacted by grants from your gift.
- Our board issues grants in the name of the fund you establish (if you prefer, grants can be made anonymously).
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.



COMMUNITY
FOUNDATION
of South Lake

A personal mission unforgotten

When they lost their adult daughter, Susan, to cancer, the Perez family received hundreds of contributions from people throughout the community. Susan had been a high school teacher, so many of the contributions came from fellow teachers and from parents of the students whose lives she had touched. “Susan cared so deeply about her work,” says Mrs. Perez, “and we wanted to use the money to continue in that spirit of helping children through their education.” The Perez family spoke with their local community foundation and decided to establish the Susan L. Perez Education Fund, a Field of Interest Fund that memorializes their daughter by supporting local educators and students. “We chose to begin this kind of fund because education is so dynamic,” says Mr. Perez. “We realize that we aren’t always aware of what our school system needs and how it works, and we wanted to be sure that, even years from now, grants made in Susan’s name make sense for our community.”

Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our professional program staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

More benefits

While you direct the Field of Interest Fund you establish from its creation, the maintenance is left up to us. Our professional program staff continually monitors changing community needs so that you can be sure grants made in the name of the fund make the most impact in your field of interest and create your personal legacy of giving.

You can add any amount to the Field of Interest Fund you establish at any time—and so can others who share your interests in community. If you endow your gift, it becomes a permanent community funding resource.

Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact your community foundation.