



where giving
THRIVES



We are the foundation for a thriving community.

At Communities Foundation of Texas, our charge is to put giving to work. To take generosity and amplify it. To take passion and focus it. To seed impact and harvest it year after year. We invest in each other. We nourish the best in our cities, our neighbors and our communities. Because we know where giving thrives, communities thrive, too. As one of the largest community foundations in the nation, CFT professionally manages more than 1,000 charitable funds for families, companies, foundations and nonprofits and has awarded \$2 billion in grants since its founding in 1953.

Our key programs catalyze change in critical areas and build connections to solve meaningful challenges in the community.

- Caruth Grantmaking
- CFT for Business
- Economic Security
- Educate Texas
- Emerging Leaders in Philanthropy
- Fund for Collin County
- GiveWisely
- North Texas Giving Day

Contact our team to learn more about our many programs and initiatives.

Dallas Headquarters:
5500 Caruth Haven Ln. Dallas, TX 75225
214.750.4226
Giving@CFTexas.org | CFTexas.org

Collin County Office:
2401 Internet Blvd, Suite 101,
Hall Park G1, Frisco, TX 75034

TYPES of FUNDS

DONOR-ADVISED Funds

Donor-advised funds are established by donors who wish to participate actively in the grantmaking process by recommending grants to their favorite nonprofits. CFT staff take care of due diligence and grant administration.

BUSINESS-ADVISED Funds

When you create a business-advised fund at CFT, we can support your company's goals with a full spectrum of services, including grantmaking, due diligence, site visits and community updates.

DESIGNATED Funds

Establish a designated fund to provide ongoing support for the good work of a specific nonprofit that has touched your life. CFT will manage the investments allowing the nonprofit to focus on their mission.

SCHOLARSHIP Funds

You may structure a scholarship fund to benefit students at any education level or institution and also in honor or memory of a loved one.

NONPROFIT AGENCY Funds

Nonprofits establish a fund with us as a simple and efficient way to build a reserve or an endowment — and help create organizational sustainability.

FIELD OF INTEREST Funds

You give the financial resources and the general "field" to support, and our team of community experts select the grantees through our thorough due diligence process.

UNRESTRICTED Funds

This fund is used when donors give directly to the foundation and entrust CFT to make charitable investments to better our community.

DONOR-ADVISED FUNDS: *How They Work*

DONORS

Establish fund & recommend grants



NONPROFITS

Receive grants & guidance from CFT



CFT

Invests & grows funds
Advises on charitable impact
Provides due diligence on nonprofits



WAYS *to* GIVE



CASH



PUBLICLY TRADED
SECURITIES



CLOSELY HELD
and RESTRICTED STOCK



OIL, GAS
and MINERAL RIGHTS



GIFTS *of* LIFE INSURANCE



BUSINESS/PARTNERSHIP
INTERESTS



REAL ESTATE



RETIREMENT PLAN ASSETS



TANGIBLE PERSONAL
PROPERTY



PLANNED GIFTS: In addition to passing assets to loved ones, you can define your charitable legacy through bequests, trust distributions, charitable trusts, charitable gift annuities, life insurance retirement plans, and honorary and memorial gifts.

Why CFT?

COMMUNITY
FOUNDATION

vs.

PRIVATE
FOUNDATION

DONOR INVOLVEMENT

Donor recommends investment allocations and grants to nonprofits

Donor appoints board which controls investments and grantmaking

LEGAL IDENTITY

Component fund at CFT

Separate nonprofit entity

START-UP COSTS

*\$0 to establish;
\$10,000 minimum contribution*

Often thousands of dollars to establish; minimum contribution of several million dollars

ANNUAL CHARITABLE PAYOUT

*Not applicable;
no artificial timeline*

At least 5% of assets

PRIVACY

Donor may be anonymous

Asset and grant information is public

IRS REPORTING

CFT handles collectively

Annual IRS Form 990 filed with required reporting schedules

GRANTMAKING & ADMINISTRATION

CFT assists donor in identification and vetting of nonprofits and administration services are provided by CFT

Family must support a grantmaking and monitoring structure as well as all accounting, investments and IRS filings

INCOME TAX DEDUCTIONS

CASH: Up to 60% of adjusted gross income

CASH: Up to 30% of adjusted gross income

*APPRECIATED STOCK:
Fair market value up to 30% of adjusted gross income*

*APPRECIATED STOCK:
Fair market value up to 20% of adjusted gross income*

*REAL ESTATE & CLOSELY HELD STOCK:
Fair market value up to 30% of adjusted gross income*

*REAL ESTATE & CLOSELY HELD STOCK:
Cost basis up to 20% of adjusted gross income*



10 ways we make GIVING EASIER

1

SIMPLIFY *your Giving*

Your charitable giving does not have to be complex to be effective and tax advantageous. Using a fund at CFT will allow you to support all of your favorite nonprofit organizations, and you will only have to track one gift receipt.

2

DEDICATED *Relationship Manager*

Imagine having your own personal concierge for charitable and legacy planning as well as curated educational opportunities.

3

EXPERTISE *with Complex Assets*

Rely on our experts to manage the review, receipt and management of the full range of your complex assets.

4

ADVANCED *Grantmaking Support*

Are you looking to make a larger impact? Our team will support you through large, multi-year, data-driven grantmaking and reporting.

5

EXPANSIVE *Community Knowledge*

With extensive community knowledge of the nonprofit landscape, we vet 5,000 grants per year and are happy to put our expertise to work for you.

6

CUSTOMIZED *Giving Plans*

Whether you want to cure cancer, regularly give to your house of worship or advance education at a chosen school, our expert staff can help you develop a custom plan to reach your charitable goals—no matter what they are.

7

EDUCATIONAL *Opportunities*

You will be invited to learn more about our community and its current needs through our events, publications and our annual fund holder dinner. Plus, we'd be honored to host family meetings or values exercises for groups of your choosing.

8

CUSTOMIZED *Legacy Planning*

Do you want someone to carry out your wishes beyond your lifetime? We specialize in deep customization for long-term legacy planning and have experience working with multiple generations, too.

9

GIVEWISELY *Series*

Our GiveWisely program empowers you to think critically about why and how you give.

10

REPUTATION *for Excellence*

Since 1953, Texans have counted on us as their go-to charitable resource, trusting our wise stewardship, vast network, thoughtful counsel, and excellent service.