

WHAT WE OFFER:



Dedicated philanthropic advisors who provide extensive community knowledge

Charitable giving options that meet your needs for today and in the future



Customized legacy planning

Flexible grantmaking



Freedom from accounting management and tax filings

Ability to keep your current investment manager



FOR AN ADDITIONAL FEE:



Unique, customized grant application process



Personalized webpage with custom URL and logo

Questions? Contact our expert:



CAROLYN A. NEWHAM, J.D.

Senior Director of Donor
Relations and Services

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WHY CHOOSE CFT OVER A PRIVATE FOUNDATION?

CHARITABLE CONCIERGE

Dedicated relationship manager to serve as your charitable concierge to ensure highest level of service.

GOVERNANCE

Options for the governance structure of your fund to meet your needs. We can help facilitate meetings, structure family discussions, set an advisory board, or you can work independently.

NO START-UP COSTS

Charitable donation that is fully grantable, \$0 to create and customize governing documents and open fund.

CUSTOMIZED GRANTMAKING

Tailored research, identification, and vetting of nonprofits, including multi-year commitments and nonprofit reporting.

BETTER TAX BENEFITS

Benefits include higher immediate tax benefits and no net investment income tax.

NO ANNUAL CHARITABLE PAYOUT

No annual required amount to grant.

PRIVACY

Donor decides, grant by grant, how much information to share with recipients.

CUSTOMIZED PHILANTHROPIC ADVISING

Information on thousands of charities and all required due diligence available without additional costs of an employee or contractor.

PHILANTHROPIC ADVISING

CFT's team of experts specialize in providing grant services to individuals, families, private foundations, corporate foundations, and businesses for various levels of charitable giving. Our team will work with you to identify your giving style and passions, as well as formulate a giving strategy that aligns with the causes and issue areas you care about most.

SERVICES WE OFFER:

1. Build your strategy

Refine your philanthropic objectives through CFT's *GiveWisely@* program

2. Find the best nonprofits

Leverage CFT's network of 3,000+ area nonprofits to find grant opportunities that align best with your grantmaking strategy. Specifically, CFT can:

- Develop customized lists of grant opportunities
- Provide financial reviews of nonprofits of interest

3. Measure progress

Monitor the effectiveness of grants through periodic grant report reviews. Specifically, CFT can:

- Coordinate site visits to build stronger knowledge of nonprofits
- Collect and review grant performance reports to better understand progress toward key goals

FOR AN ADDITIONAL FEE:

CFT can design and implement customized grantmaking strategies for clients that have very specific needs. Services include:

- Designing or updating grant guidelines, grant applications, and grant evaluations
- Hosting customized application processes on CFT's online grantmaking platform
- Reviewing grant applications and developing grant recommendations
- Coordinating nonprofit evaluations so client can better understand the impact of grants



Learn more about the benefits of CFT's philanthropic advising services by scanning the QR code.

SCAN ME



“The value that CFT brings is in working with so many nonprofits closely. We’re able to align with the goals of donors and recommend vetted nonprofits that are best positioned to do specific types of work and make an impact long-term.”

– GALEN SMITH, CFT'S SENIOR
COMMUNITY PHILANTHROPY
OFFICER

Questions? Contact our expert:



GALEN SMITH

Senior Community Philanthropy Officer
gsmith@cftexas.org | 214-346-5525

CFT's current philanthropic advising partnerships include: