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

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

**NONPROFITS**
Receive grants & guidance from CFT
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?

<table>
<thead>
<tr>
<th>COMMUNITY FOUNDATION</th>
<th>U.S.</th>
<th>PRIVATE FOUNDATION</th>
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<tbody>
<tr>
<td>DONOR INVOLVEMENT</td>
<td>Donor recommends investment allocations and grants to nonprofits</td>
<td>Donor appoints board which controls investments and grantmaking</td>
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<td>LEGAL IDENTITY</td>
<td>Component fund at CFT</td>
<td>Separate nonprofit entity</td>
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<td>START-UP COSTS</td>
<td>$0 to establish; $5,000 minimum contribution</td>
<td>Often thousands of dollars to establish; minimum contribution of several million dollars</td>
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<td>ANNUAL CHARITABLE PAYOUT</td>
<td>Not applicable; no artificial timeline</td>
<td>At least 5% of assets</td>
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<td>PRIVACY</td>
<td>Donor may be anonymous</td>
<td>Asset and grant information is public</td>
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<td>IRS REPORTING</td>
<td>CFT handles collectively</td>
<td>Annual IRS Form 990 filed with required reporting schedules</td>
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<td>GRANTMAKING &amp; ADMINISTRATION</td>
<td>CFT assists donor in identification and vetting of nonprofits and administration services are provided by CFT</td>
<td>Family must support a grantmaking and monitoring structure as well as all accounting, investments and IRS filings</td>
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<td>INCOME TAX DEDUCTIONS</td>
<td>CASH: Up to 60% of adjusted gross income</td>
<td>CASH: Up to 30% of adjusted gross income</td>
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<td></td>
<td>APPRECIATED STOCK: Fair market value up to 30% of adjusted gross income</td>
<td>APPRECIATED STOCK: Fair market value up to 20% of adjusted gross income</td>
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<td></td>
<td>REAL ESTATE &amp; CLOSELY HELD STOCK: Fair market value up to 30% of adjusted gross income</td>
<td>REAL ESTATE &amp; CLOSELY HELD STOCK: Cost basis up to 20% of adjusted gross income</td>
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Why CFT?

- COMMUNITY FOUNDATION: Offers donor control and flexibility in investment and grantmaking. Available to individuals with at least $5,000.
- PRIVATE FOUNDATION: Provides more control and professional management for larger donations. Often requires significant contributions and offers greater organizational capacity.

For more information, visit [Community Foundation of Texas](https://www.cftx.org) or [Private Foundation](https://www.privatefoundation.org).
DEDICATED Relationship Manager
Imagine having your own personal concierge for charitable and legacy planning as well as curated educational opportunities.

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

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.

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.

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.

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.

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.

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

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.