



COMMUNITY FOUNDATION BOULDER COUNTY

INSPIRING IDEAS. IGNITING ACTION.®

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Tax-Savvy Giving: A Quick Reminder

Year-end is a good time to remind your clients about the **benefits** of giving shares of highly appreciated stock. Donating long-term appreciated securities, including stock, bonds, and mutual funds, to a fund at your Community Foundation delivers much greater benefits compared with donating cash, or selling the securities and contributing the after-tax proceeds.



Your Community Foundation team is here to help you and your clients establish the tax-savvy giving vehicles, especially at year-end. We encourage you to contact us with all of your clients' year-end charitable giving needs.

Philanthropy in the News: Donor-advised Funds

Donor-advised funds continue to be a hot topic among commentators, including several recent opinion pieces published in the **Chronicle of Philanthropy**. *Now is an ideal time to remind your clients of the benefits of establishing a donor-advised fund through your Community Foundation.*

Donor-advised funds are popular because they allow an individual or family to make a tax-deductible transfer that qualifies as a charitable contribution, and then later recommend gifts to favorite charities from the fund when the time is right. A donor-advised fund operates a lot like a checking account just for charity, except it's established according to the IRS guidelines that create the tax advantages. Most importantly, however, establishing a donor-advised fund through the community foundation offers the additional benefit of allowing your clients to access the expertise of our team who is dedicated to staying up-to-date with the community's greatest needs and priorities and the causes your clients care about.

This means your clients can make a meaningful and lasting difference in *our community*-an advantage not available through commercial donor-advised fund providers.

Meet *Your* Community Foundation Team

We're pleased to work with professional advisors around Boulder County to ensure your clients receive stellar service and a personalized approach to actualizing their philanthropic goals and related tax savings. With our practice of working in partnership, knowledge of local issues and the philanthropic landscape, and commitment to impact, we're your best resource for donor-advised funds and planned giving. Please contact us to learn how we can assist you and your clients now and into next year.

Members of our Philanthropic Services Team:

- Lynda Ricketson, Vice President of Philanthropic Services
- Peggy Driscoll, Major Gifts Officer
- Brooke Kahl, Philanthropic Services & Communications Associate
- Caroline Landry, Major Gifts Officer
- Matt Zwiebel, Director, Pledge 1% Colorado

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Request for Proposals: Impact Advisory Services

Request for Proposals: Impact Advisory Services of Community Foundation Boulder County - Impact Investing Fund

Submissions due January 6th, 2020.

[See full RFP here](#)

Statement of Affirmation

Community Foundation Boulder County is committed to being a *community catalyst* for good, alongside donors and partners like you. We believe our community is stronger when all people - women and men, children, older adults, immigrants, people of color, GLBTQ individuals, those with varying abilities and from all faiths - are respected, welcomed, and invited to share their assets and contributions in community building.

We stand with others, in Boulder County and beyond, who courageously strive to build more inclusive communities rather than walls of division. We remain wholeheartedly committed to social justice for our most marginalized and vulnerable people and for the care of threatened environments. We believe in the power of art and music to improve our lives and community. Now, more than ever, we seek opportunities for local action and invite you to join us in our **ongoing leadership work** that includes grantmaking, outreach, and advocacy. We accomplish more together than we do alone.

Donating to your Community Foundation makes a local impact. Get inspired. Donate here.