Optimize Charitable Giving

Give your clients the best results with their gifts

The Saginaw Community Foundation provides services that can help your clients find the perfect fit for charitable giving. SCF’s services – from assessing needs to disbursing grants – can help your clients get the best results with their gifts. Learn how SCF can help guide the giving process and optimize the results:

Field of Interest Funds
Connecting personal values to high-impact opportunities
Assessing needs, accepting and processing grant applications, researching solutions, recommending and awarding grants, documenting results, providing customized donor reports, donor recognition and legacy programs

Supporting Organizations
High impact, high involvement, low hassle
Administrative support, investment management, research, governance and grantmaking resources

Donor Advised Funds
A personal approach to giving
Donor services, investment management, grant recommendation and validation and grant processing

Designated Funds
Helping local organizations sustain and grow
Complex gift acceptance, endowment management and annual disbursements

Motivations for giving

The reasons for giving are varied, as are the things people hope to achieve.

Some believe giving is a choice, others see it as a moral imperative. Some give gifts in a spirit of reciprocity, others give expecting nothing in return. Some are concerned with maximizing tax benefits, others want to optimize social change, alleviate immediate needs or foster long-term improvement. Some seek recognition, others are looking only for results.

Fortunately, there are as many ways to give as there are motivations for giving.
What do we do?

It’s a question we get a lot: “What exactly does Saginaw Community Foundation do?” Over the years, the staff and Board of Directors have worked to explain the Foundation’s role and we’ve broken it down into four areas. We like to define ourselves as:

1. **A philanthropic vehicle**
2. **A charitable organization**
3. **A community leader/convener**
4. **A volunteer organization**

Defining ourselves as a philanthropic vehicle helps explain the relationships we develop – and the endowment funds established – that allow us to provide grants and scholarships.

By pointing out that we’re also a charitable organization highlights that we award grants and scholarships.

We’re a leader/convener. Many Saginaw Community Foundation staff members sit on or assist with various community committees, or consult with other community leaders or organizations about key challenges or opportunities.

Finally, as a volunteer organization, we associate ourselves with other community members who want to be a part of our mission: to fulfill donor wishes and enable community initiatives to come to life, now and forever.

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### The Art of Gift Planning

Professional advisors are called upon to listen closely, interpret carefully, counsel wisely and recommend solutions. The donor profiles below show how different charitable solutions may suit the unique circumstances of individual donors.

<table>
<thead>
<tr>
<th></th>
<th>Personal Motivation</th>
<th>Philanthropic Objective</th>
<th>Financial Goal</th>
<th>Charitable Interest</th>
<th>Giving Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selfless Benefactor</strong></td>
<td>Improve the lives of others because it is a moral imperative</td>
<td>Support causes that align with personal goals and values</td>
<td>Maximize the value of my gift</td>
<td>Support food pantries and family centers in impoverished neighborhoods</td>
<td>Field of interest fund</td>
</tr>
<tr>
<td><strong>Prudent Investor</strong></td>
<td>Contribute to the common good because it makes sense socially and financially</td>
<td>Support the causes that do the most good through endowments</td>
<td>Maximize the value of my gift</td>
<td>Increase opportunities for residents of my community</td>
<td>Unrestricted fund</td>
</tr>
<tr>
<td><strong>Family Philanthropist</strong></td>
<td>Extend family legacy of giving to the next generation</td>
<td>Support causes important to family’s traditions and values</td>
<td>Avoid capital gains, maximize this year’s deduction</td>
<td>Variety of deserving causes</td>
<td>Donor advised fund</td>
</tr>
<tr>
<td><strong>Loyal Patron</strong></td>
<td>Give back to the organizations that have contributed to my well-being and success</td>
<td>Support my alma mater and favorite charities</td>
<td>Avoid capital gains, maximize this year’s deduction</td>
<td>Help at-risk youth</td>
<td>Scholarship for deserving local youth</td>
</tr>
<tr>
<td><strong>Social Giver</strong></td>
<td>Socialize with friends and peers at charity auctions, events and galas</td>
<td>Support favorite charities</td>
<td>Avoid capital gains, create lifetime income</td>
<td>Provide operating support to a local hospital, hospice, art museum and symphony</td>
<td>Some direct gifts plus a charitable gift annuity that becomes a named unrestricted fund</td>
</tr>
<tr>
<td><strong>Grateful Trader</strong></td>
<td>Show appreciation for financial success and be recognized for generosity</td>
<td>Give back to community that has supported my business</td>
<td>Avoid capital gains, create permanent legacy</td>
<td>Support the future of my community</td>
<td>Endowed donor advised fund</td>
</tr>
<tr>
<td><strong>Faithful Servant</strong></td>
<td>Give back to God</td>
<td>Fulfill obligation to support temple, church or faith organization</td>
<td>Maximize this year’s deduction</td>
<td>Support faith community operations and mission</td>
<td>Designated fund in name of faith-based organization</td>
</tr>
</tbody>
</table>

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### Advising clients:

**Donor advised funds or a private foundation?**

As a professional advisor, you can help your clients select a giving option that aligns with their personal motivations, philanthropic objectives and financial goals.

Over the past decade, the trend in lifetime giving has been the establishment of donor advised funds. This method of giving offers immediate tax deductions and ongoing involvement in making charitable recommendations.

While some donors may be attracted to the prestige of a private foundation, many value the full service support that the Saginaw Community Foundation offers for donor advised funds. Contact us to learn more.