



# Optimize Charitable Giving

Give your clients the best results with their gifts

## 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.

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

### Unrestricted Funds

*Meeting ever-changing community needs*

Assessing all community needs and opportunities and services similar to field of interest funds

### Scholarships

*Investing in deserving students*

Soliciting and processing applications, selecting scholarship recipients, disbursing awards and monitoring student eligibility

### 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





**Saginaw**

community foundation

1 Tuscola St., Suite 100B • Saginaw, MI 48607  
(989) 755-0545 • Fax (989) 755-6524

[www.saginawfoundation.org](http://www.saginawfoundation.org)  
[info@saginawfoundation.org](mailto:info@saginawfoundation.org)

 [facebook.com/saginawcommunityfoundation](https://facebook.com/saginawcommunityfoundation)  
 [youtube.com/user/saginawcomfoundation](https://youtube.com/user/saginawcomfoundation)

 [pinterest.com/scfoundation](https://pinterest.com/scfoundation)  
 [twitter.com/scfoundation](https://twitter.com/scfoundation)

## 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.*



**Saginaw**

community foundation

## 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.

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

## 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.