

Maximize Your Giving Impact with the Cleveland Foundation

With the **Cleveland Foundation** as your partner, we can help you and your family build a philanthropic strategy that leads to positive and lasting change in the community and carries real tax benefits. Follow the pathways below to discover the ideal philanthropic tool for your lifestyle and interests – then call us for a consultation at 216.685.2006.

I would like to make a difference supporting nonprofit organizations and causes that interest me.

I care about nonprofit organizations either locally, regionally or nationally.

I'm interested in wise investment options that allow me to leverage my available resources and make an even greater charitable impact.

I would like to make an **IMMEDIATE IMPACT...**

I would like to plan for a **FUTURE IMPACT...**

And remain active with grantmaking.

And rely on the foundation to carry out my intent.

With a gift from my estate.

With a gift that provides immediate tax benefits and also generates income back to me or others.

Your ideal philanthropic vehicle may be a ...

DONOR ADVISED FUND

You can create a Donor Advised Fund and receive an immediate tax deduction with an initial gift of cash, appreciated securities like stocks and bonds, or a combination of assets. Additional family members can become fund advisors or successor advisors.

SUPPORTING ORGANIZATION (Family Foundation)

You can create a Supporting Organization and opt for a more structured approach, similar to a private foundation. The full-time, professional staff at the Cleveland Foundation will work with you to appoint a board of directors and create a philanthropic plan. You will receive an immediate tax deduction, and we will help you meet the necessary legal requirements.

NAMED FUND

You can open a Named Fund to support one or more charitable organizations or a field of interest, and the foundation will automatically distribute grants according to your wishes.

Your ideal philanthropic vehicle may be a ...

BEQUEST

You can make a gift to charity in your will as a direct way to provide for the community after you're gone. The Cleveland Foundation can work with you and/or your professional advisor to create a customized legacy plan.

CHARITABLE GIFT ANNUITY

You can establish a Charitable Gift Annuity benefiting one or more nonprofit organizations, gain an immediate tax deduction, and receive fixed payments from the foundation for life.

CHARITABLE REMAINDER TRUST

You can establish a Charitable Remainder Trust benefiting one or more nonprofit organizations, gain an immediate tax deduction for the future value of the gift, and receive payments from the foundation based on a percentage of the trust's value or a fixed amount. You may make additional gifts to the trust and qualify for additional tax benefits.



Turn your passion into purpose: www.ClevelandFoundation.org