



Serves PROFESSIONAL ADVISORS

WHO ARE WE?



- Independent 501c(3) public charity
- Community foundation for Catholics
- Attract, professionally manage, and invest gifts
- More than \$84.6MM and 351 assets under management*
- Independent Board of Directors
- \$21.2MM granted since 1997*
- Funds invested in accordance with Catholic values
- More than 25 years experience

WHAT VALUE DO WE BRING YOU?



- Trusted partner
- Collaborative approach to personalized solutions
- Introductions to our Legacy Giving Societies
- Helping your client reach their charitable goals
- Deep understanding of donor and Catholic community needs
- Current and planned charitable giving expertise
- Protecting the donor's intent forever

IF YOUR CLIENTS WANT TO LEAVE A CATHOLIC LEGACY, WE GIVE YOU OPTIONS



CHARITABLE GIVING VEHICLES

- Permanent Endowment Funds
- Donor Advised Funds
- Charitable gift annuities
- Charitable trusts

FUNDING OPTIONS

- Will bequests
- Cash or securities
- Retirement Plan Assets
- Life Insurance
- Personal property
- Real estate
- Life estate
- Closely held stock

SHARING OUR EXPERTISE, SUPPLYING YOU WITH RESOURCES



- Catholic Foundation Professional Advisors Network: luncheons, speakers and CEU training credit opportunities
- Advisor e-newsletters
- GiftLaw Pro - complete charitable giving and tax information service
- Online tools including GiftLawCalculator

Learn more at www.cfnga.org
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*Fiscal year ending June 30, 2020