Financial Advantages

of the Fairfield County Foundation

**Tax Smart**—Becoming a member of the Fairfield County Foundation donor family offers an easy way for your clients to accomplish their charitable dreams. As our partner in giving, they receive the simplicity and tax advantages of a public charity combined with the personal recognition, involvement and the flexibility of a private foundation.

**Cost Savings**—If each individual fund operated independently and had to create our services on its own, the price tag would be enormous. But each of our funds shares the costs of a knowledgeable, service-oriented staff and expert investment managers. The result is significant savings for your clients.

**Convenience**—We make charitable giving easy. Funds are established with one signed document. At their convenience, donors can make grants, add to their fund, and check balances. The Foundation staff performs due diligence on nonprofit organizations, issues checks and award letters, manages public relations, and monitors grant award progress and final community impact. The donor is relieved from all administrative, accounting and legal services as well as shielded from persistent solicitations often associated with charitable giving.

**We Know Fairfield County**—Our staff has an extensive knowledge of pressing issues and experience with nonprofit organizations throughout our community. We are a local organization with deep roots in this community. We do the hard work for donors by identifying our community's needs and monitoring which organizations are effective, sustainable and innovative in addressing those needs.

**We Know Philanthropy**—We are experts when it comes to giving, granting and involving family in your work. We can help create the best giving plan and vehicle based on your client's charitable goals, giving level and time available for philanthropy. We help your clients maximize their charitable gifts.

**Customized Charitable Solutions**—The Fairfield County Foundation has always been a trusted resource for attorneys, financial planners, accountants and philanthropic advisors as they address each client’s unique situation and expectations. We offer them a depth of knowledge about our community and links to resources throughout Ohio and across the United States. We are active and longstanding members of the Ohio Grantmakers Forum, accessing the most current information on philanthropic trends and charitable giving.

**Asset Management**—The Fairfield County Foundation works with Legacy Strategic Asset Management to manage the assets in a manner that will preserve and maintain the real purchasing power of the principal, while allowing for an annual distribution of the income. The Foundation provides highly rated fund management, pools assets into a larger portfolio, diversifies investments and ensures lower management fees.

**We’re Stable and Sustainable**—As caretakers of funds that will long outlast their donors, we understand the nature of permanent legacy. We expect that donors will create funds designated to last well into the future. And if someday the need for the fund no longer exists, our leadership will find the most appropriate alternative that is as close to the original vision as possible.