



For Professional Advisors

Whether your clients are planning their estates, selling a business or stock options, or managing an inheritance, you can help them achieve their charitable and financial goals by working with the Community Foundation.

With expertise in planned giving, donor service, and grantmaking, we can work with you to tailor a charitable fund to meet your clients' needs now or through their wills or other deferred giving arrangements.

You Get a Cost-Free Resource

Since 1995, our Community Foundation has partnered with lawyers, accountants and financial advisors to help with their clients' charitable planning.

You Control the Client Relationship

We're here to help extend the range of services you offer to your clients. We're a non-ego partner and we take our cues from you. And you can continue to manage your client's assets after the gift is made through our Financial Advisor Program.

You Get Demonstrated Expertise

By partnering with the Community Foundation, you will instantly connect your clients with a trusted leader in the philanthropic field.

With philanthropic investment expertise, customized philanthropic solutions and in-depth knowledge of the Southcoast region and Southeastern Massachusetts, you and your clients will have access to a team of professionals who will make sure each charitable investment provides the greatest emotional, civic and financial benefit possible.

We take care of the asset transfers, make grants, handle all the record keeping and reporting, and provide your client with quarterly statements and acknowledgements of gifts and grants.

"The Community Foundation adds real value to client relationships through their expertise in local philanthropy and their commitment to protect and preserve the donors' interests. They don't have a vested interest in a particular organization and that makes them a highly effective and trusted partner."

---Eric Strand, President, American Research & Management Co.

How Does the Community Foundation Compare to Other Philanthropic Funds?

Administrative Responsibilities & Expenses			
	Donor Advised Fund at Community Foundation	Private/Family Foundation	Commercial Charitable Fund
Federal requirement for distribution of funds	None	5% annually	Same as Community Foundation
Donor designates future uses of funds	When fund is established	When the Foundation is established	Same as Community Foundation
Time length to establish	Within 24 hours	Several months	Same as Community Foundation
Anonymity	Full or partial anonymity as desired, on each grant	None – filings are public info, posted on Web	Either full or none
Incorporation, tax status, audit, filings	None – We do all administrative work	You are personally responsible for all	Same as Community Foundation
Directors, officers, insurances	None – We do all administrative work	You are personally responsible for all	Same as Community Foundation
Evaluation of applications & possible grantees	We are the experts in local grantmaking. Partner with us as much as you want in the process	You are personally responsible for all	No support services
Grantmaking, verification, reports on outcomes	We send grants, verify receipt, send you reports	You are personally responsible for all	Just send checks
Recommending a grant from your Fund	As you wish: email, letter, in person, phone, family meetings or donor groups	Your responsibility	By mail or email
Relationships with other donors	As you wish: We offer many formal and informal opportunities each year	Your responsibility	No support services
Service fees	Used to support our services to donors and community leadership initiatives	None	Used for corporate profit

Our mission: To mobilize philanthropy by matching donors and resources with community needs for the benefit of our region.

The Community Foundation of Southeastern Massachusetts was launched in 1995 by a group of dedicated volunteers who wanted to create a new avenue for encouraging philanthropy in Southeastern Massachusetts.

Incorporated in 1995 as a 501(C)3 non-profit institution, the Foundation's first \$100,000 gift was received that year, and in 1997 the Community Foundation received a gift of one million dollars to establish the drug abuse prevention and education effort known as Youth Entitled to Success.

Today, under the guidance of the Board of Directors and President John Vasconcellos, the Community Foundation has grown to include nearly 200 funds and more than \$35 million in assets, serving 41 cities and towns in Southeastern Massachusetts with a focus on the Southcoast region. The Foundation invests and administers these funds, with assets pooled for investment purposes, under the guidance of our Investment Advisor, Prime, Buchholz & Associates based in Portsmouth, NH.

**Our Community.
Your Foundation.**

For more information about the Financial Advisor Program at the Community Foundation, contact Ethan Kehoe, Director of Development, at 508-996-8253 ext. 216 and ekehoe@cfsema.org.