LEGACY FUNDS ARE:

PERSONAL
- Legacy funds are ideal for families and charitable individuals who want to designate how their assets will be distributed after their lifetimes.
- Legacy funds are recognized as named funds of the Community Foundation.
- Legacy funds can be established in honor or memory of a loved one.

CUSTOMIZED
- You may name your heirs as successors to your legacy fund.
- You may name an unlimited number of nonprofit beneficiaries.
- Legacy funds are not irrevocable. You may close the fund any time if your plans change.

EFFICIENT
- The Community Foundation can receive gifts designated in a will or estate plan including life insurance policies, IRAs, 401(k) plans, real estate, charitable gift annuities and charitable remainder trusts.
- Legacy funds are easily modified without changing estate documents.

FINANCIAL FACTS
- Legacy funds: Can accept a wide variety of gifts.
- May be invested with your own investment manager or invested in the Community Foundation’s portfolios.
- Can be established for any amount.
- May qualify for the estate tax charitable deduction.
- Are free of administrative fees until assets are received.
TEN REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION OF TAMPA BAY

- We are a local organization with deep roots in the community.
- We have broad expertise on community issues and needs.
- We provide highly personalized service tailored to your charitable and financial interests.
- Our funds help people invest in causes they care about most.
- We accept a wide variety of assets and can facilitate the most complex forms of giving.
- Wepartner with professional advisors to create highly effective approaches to charitable giving.
- We offer maximum tax advantage for most gifts under federal law.
- We multiply the impact of gift dollars by pooling them in professionally managed portfolios.
- We build endowment funds that benefit the community forever and help create personal legacies.
- We are a collaborative community leader, coordinating resources to create positive change.

GIVE
at the time of your passing and your estate could receive a tax deduction

GROW
your charitable assets or distribute to charity immediately

GRANT
to the causes you care about or name your heirs as successor advisors to your fund

LEGACY FUNDS

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