



THE FAMILY OFFICE OF PHILANTHROPY

WELCOME TO THE FAMILY OFFICE OF PHILANTHROPY AT MARIN COMMUNITY FOUNDATION

Modern philanthropy is dynamic. Global. Creative. It can shape the world in fresh ways, providing opportunities to leave a legacy that transcends generations. To create the kind of impact you want, you need access to the people, resources, issue-area knowledge, and evaluation tools that can turn your ambitions into reality.

For decades, the Marin Community Foundation has been a philanthropic force, partnering with individuals and families to maximize their giving in ways that create a positive impact in the community and in the world. Let's work together.

Tailor-made philanthropy

For some, philanthropy is more than an interest. It's an essential part of who they are. Yet, the burden of creating and maintaining a private foundation can be too great. The legal paperwork, accounting regulations, board meetings, consultants – it's a time-consuming and expensive endeavor. Moreover, it can be a challenge to identify high-impact organizations to partner with if you don't already have deep and extensive relationships with organizations in a given community.

For those donors with a profound commitment to charitable giving – and significant resources to dedicate – we have established the **Family Office of Philanthropy**.

Akin to family offices within the wealth management industry, our Family Office of Philanthropy provides customized, comprehensive services that enable donors to achieve a substantive impact through their philanthropy.

A brief overview of MCF

- Established in 1987
- Among the 10 largest community foundations in the U.S.
- Partners with over 500 individuals & families in their giving
- Oversees over \$3 billion in philanthropic assets
- Distributes approximately \$150 million in grants annually
- Makes grants to charitable organizations locally, nationally and internationally
- Has granted more than \$2 billion over the past 30 years



Marin
Community
Foundation

A modern alternative to a private foundation

Our Family Office of Philanthropy can partner with you to develop a philanthropic strategy that simplifies giving while offering a multitude of benefits customized to your needs. Choose from two different levels of support:

Virtuoso

an effective, streamlined, turnkey solution for funds of \$5 million or greater to help you reach your impact goals

Bespoke

the next level in tailor-made philanthropy for those with significant assets to drive even greater impact

With Virtuoso and Bespoke, you'll have access to these benefits:

- **Customized, comprehensive philanthropic advice.** In-depth research, access to local, national, and global nonprofit leaders, multi-generational family convenings, private site visits, and more.
- **Access to exclusive curricula and offerings.** Includes our Venture Impact Program for impact investing of the fund's assets, and The Lens, an equity framework adding an increased level of intention.
- **Grantmaking support.** A team to take care of all the administrative details, such as garnering and reviewing proposals, structuring grants, ensuring IRS compliance, and issuing payments.
- **Family involvement.** A strategic, thoughtful, and formalized approach to family philanthropy. Virtuoso donors who establish multiple funds for children or other family members are charged an aggregated fee based on total family fund balances, thereby avoiding a fee for each individual fund.
- **Global reach.** Complimentary international grantmaking and access to philanthropic travel and knowledge on global issues and organizations.
- **Investment options.** Partner with your family office or wealth advisor to design your investment strategy, or ask MCF's professional Investment Committee to invest the assets on your behalf.
- **Complex assets.** Leverage a number of assets in order to open your fund or add to it in the future. Virtually any asset can be accepted, including securities, business interests, cryptocurrencies, personal property, real estate, and the transfer of a private foundation's assets.
- **Cost-effectiveness.** Set-up fees and annual administrative fees are significantly lower than those associated with a private foundation.
- **Tax-efficiency.** Gifts qualify for maximum tax benefits, including full deductions for contributions of real estate and closely held stock. There is no excise tax on investment income.
- **Private label branding.** Upon request, MCF's marketing team can provide support in branding your fund.
- **A fully dedicated team.** We'll work with you to build an advisory team of experts that is 100% dedicated to you and the impact you want to make. Everything will be tailored to your specific needs and requirements. *[Available to Bespoke clients]*

Interested in exploring these options in more depth?

Contact **Andrea Henderson, Senior Director of Planning**
at 415.464.2507 or ahenderson@marincf.org.