ADIRONDACK Community FOUNDATION

Charitable Solutions - How We Can Support Your Clients

Helping people give back to the place they love – it's the cornerstone of what we do at Adirondack Community Foundation to strengthen our communities through philanthropy. Partners like you are essential in making that happen. As you work with your clients to channel their philanthropic passions and build their legacies, know that we are here to assist you so that – together – we can build a better Adirondacks today, tomorrow, and always.

Why Adirondack Community Foundation?

- **Trusted partners with local roots** - We are the only community foundation serving the Adirondacks, working to benefit all communities across the Region.
- **Easy giving** - We're here to help your clients realize their charitable goals and streamline their giving to the organizations and causes that matter most to them.
- **Philanthropic specialists** - Our staff and board's local knowledge and connections ensure we stay current on issues and community needs.
- **Administrative work** - We work with your client to make granting to Adirondack organizations easy, and handle the back-office work.
- **Your clients come first** - We honor donor intent in perpetuity. Should the unforeseen occur, the community foundation can invoke variance power so the donor's original intention is maintained.

Strengthening Investments in People and Communities

An investment in Adirondack Community Foundation is an investment in the future of our Adirondack communities. In establishing a fund with the community foundation, your clients' philanthropy can grow exponentially over time. Please see the next page for a glimpse into the potential long-term impact investments in the community foundation can have over time.

We are committed to serving as a prudent steward of the gifts entrusted to us by donors past, present, and future. With diligent guidance from our Finance Committee, every dollar we steward strengthens our investment in people and communities.

Establishing Gift (Permanent Fund)	10 Years		20 Years		50 Years	
	Dollars Granted	Fund Value	Dollars Granted	Fund Value	Dollars Granted	Fund Value
$100,000	$44,410	$115,400	$98,740	$127,480	$298,270	$171,810
$500,000	$222,070	$576,920	$493,680	$637,280	$1,491,260	$858,940
$1,000,000	$444,120	$1,153,840	$987,360	$1,274,560	$2,982,550	$1,717,920

*This table reflects an estimate of cumulative grants based on Adirondack Community Foundation's spending policy: 4.5% of the trailing 12 quarters average balance. Fund Values reflect estimated market values based on 2% ROI net of fees and grants.

Ways Your Clients Can Give Back to the Adirondacks

Donor Advised Funds (DAFs) cater to donors looking to maintain control over their charitable giving. We work with your client to establish the purpose of their fund and how it will act, either as a permanent fund, like an endowment, or flexible. The minimum to start a DAF is $25,000, but many opt to grow their fund over time.

Establishing a charitable legacy through estate planning can ensure your client's philanthropy is here to support the Adirondacks for years to come. A legacy can be established through a DAF, designated fund, field of interest fund, or a scholarship fund, or your client can help to build the Generous Acts Fund through their estate, which pools donations to respond to the region's most pressing needs.

Ways We Can Work Together

For Lawyers and Attorneys

While working with your clients on estate plans, we offer sample bequest language for those interested in leaving a legacy through the Foundation – and can start and manage funds for this purpose. For clients with complicated estates, we keep a local estate attorney on retainer who can provide further assistance if needed.

For Financial Professionals

IRAs and stock can serve as excellent charitable tools for your clients, including naming Adirondack Community Foundation as a beneficiary, or, if your clients are over age 70.5, directing their IRA's required minimum distribution to a fund of their choosing. Donating gifts of stock is a useful alternative to tax-loss harvesting, to get a tax deduction.

For Insurance Professionals

Using a life insurance policy as a charitable giving tool, your clients can make a far greater gift than might otherwise be possible without diluting assets left to the family. Alternatively, your clients can gift a life insurance policy that is no longer needed - for example a policy purchased for children who are now independent adults.

If you're ready to make a difference that lasts, we're your guide.

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