



Client-Centered Philanthropy

For Professional
Advisors



Our mission:
*We connect people who care
with causes that matter.*



Working with the
Community Foundation is
Good for Business.

Help your client leave a legacy, not just an inheritance.

By providing charitable options tailor-made to meet your clients' financial and charitable goals, we can help them provide for themselves, their heirs, and their community.

Access FREE expertise.

Our non-profit services and our extensive grant making work gives us a unique insight into the non-profit community throughout Starved Rock Country. Let us know your client's interests and we will provide options for your next client meeting.

Ensure oversight forever.

We help your clients find tax-friendly ways to support one or more charitable causes and we handle all the administrative details. Our staff and board ensure that your client gifts are used as intended by their charities of choice even after your client passes on. We also continue to confirm that grant recipients remain IRS compliant.

Strengthen relationships with clients.

74% of advisors say that discussing philanthropic with clients is good for their business.

It presents a more comprehensive approach to managing their wealth and shows interest in more than just their money.



The Community Foundation provides a way for an individual or family to give to specific charities, communities or causes.
Anything is possible. Just tell us what your client cares about and we will help create a tailored plan.

Here's how the Community Foundation can help...

SRCCF helps you to create a fund agreement that is right for your client and their philanthropic goals. Endowed funds are invested to grow over time. Periodic grants can be recommended if a non-endowed fund is chosen. Annual earnings provide additional funds for giving to the charities of your clients' choice.

Give now.

Start a non-endowed fund today with as little as \$1,000 using cash, securities or other assets for immediate tax savings. You can also create an endowed fund with \$15,000 or a growth endowment with \$3,000 per year over 5 years.

Give later.

Leave a legacy gift to a charity or specific cause in your client's will or through a beneficiary designation upon death.

We offer a variety of Fund Options.

Funds for Active Donors

Donors who start donor advised funds make grants to their favorite local nonprofits, schools, or parks. Our staff does the administrative work, much like a private foundation.

Field of Interest

Whether it's youth programming, special needs communities, animal welfare, services for seniors, veterans, the homeless or the hungry, donors can create a fund to support their causes. These funds allow us to meet changing community needs.

Designated Funds

Started by a donor for a specific nonprofit of their choice for whatever purpose the donor chooses. These funds can be named in honor or memory of a loved one. The nonprofit receives an annual grant from the fund.

Geographic Area

Donors can create funds to support their own community or city.

Agency Endowments

Nonprofit agencies invest dollars with us that are not needed for operational expenses. They do this for a variety of reasons, including investment expertise, efficiencies, and access to planned giving advice. The fund is created with the intention of perpetuity - the initial donation will stay in the fund, and the interest will be used to create grants.

Community Impact by SRCCF

SRCCF has created its own funds: SRCCF Leadership Fund, The Arts of Starved Rock Country Fund, Women Inspired Network Fund, SRCCF Community Impact Grants, and Youth Engaged in Philanthropy.

Although the Starved Rock Country Community Foundation is a public charity, it does not promote one charitable cause. Instead, our mission is to provide for Starved Rock Country's changing needs by building pass-through funds, scholarships, and permanent endowments that support all kinds of nonprofits now and into the future.

Your client can Leave a Legacy.



95%

Leave 95% of an estate to children, family, and friends.

5%

Leave 5% to the community: animals and environment, senior care and support, housing, shelter and food, arts, music and theatre, children and education.

We can help you. Here's how:

Create a lasting legacy that will benefit the community for generations by leaving a charitable gift to the Community Foundation in a will, trust, or through another deferred gift.

A charitable gift can help your client meet personal and financial goals too.

We welcome you to contact us to answer any questions you may have about tax-friendly giving options at (815) 252-2906.

My client says he wants to create a private foundation. Would a donor advised fund be a better option?

We can help you and your client understand the pros and cons of private foundations, donor advised funds, and other charitable options so they can make an informed decision that helps them meet charitable and financial goals.

Is there a way to transfer an IRA required minimum distribution (RMD) to charity to reduce my clients' taxes.

Donating an IRA RMD to a qualified charity like the Community Foundation can help clients age 70.5 or older avoid additional tax, not only by keeping them in a lower tax bracket, but also because reducing income can lead to increased deductions that may have been phased out otherwise. It can also lead to lower tax rates for social security, income, and/or capital gains.

Can I continue to manage my clients' assets if they create a fund with the Community Foundation?

Yes. We offer opportunities for you to continue to manage a client's donated assets. Ask us about our partnership program for financial advisors.

My client wants to make a gift using appreciated stock or real estate, but their favorite charity says that they can only accept gifts of cash. Can the Starved Rock Country Community Foundation help?

Yes. Your client can set up a fund with the Community Foundation with stock or another non-cash asset like real estate. They can then make cash grants from that fund to the charity of their choice.

I have nonprofit clients. Do you offer services that I might be able to share?

We offer a variety of free workshops, consulting services, and fund management services for local nonprofits.

**Looking for resources that can help you meet
your clients' goals?
Let us know how we can help.**

Learn more about our resources at srccf.org

Or call 815.252.2906 to arrange a
private meeting where you and your
clients can explore a variety of options.



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Starved Rock Country Community Foundation (SRCCF) is a 501(c)3 non profit
organization as designated by the IRS and the State of Illinois. Financial contributions
are tax-deductible in accordance with IRS guidelines.