



**I prefer to be contacted by:**

- \_\_\_\_\_ Phone
- \_\_\_\_\_ Email
- \_\_\_\_\_ Correspondence

**The best time to contact me Monday-Friday is:**

- \_\_\_\_\_ 8 a.m. - 10 a.m.
- \_\_\_\_\_ 10 a.m. - Noon
- \_\_\_\_\_ Noon - 3 p.m.
- \_\_\_\_\_ 3 p.m. - 6 p.m.

**Your Motivation  
For Charitable  
Giving**

**My main goals for my charitable giving are to:**

- \_\_\_ Organize my current giving and learn how to give more effectively
- \_\_\_ Reduce income, estate and/or gift tax
- \_\_\_ Help my community
- \_\_\_ Encourage my children and the next generation of my family to give back
- \_\_\_ Begin to establish/continue a family charitable legacy
- \_\_\_ Avoid or reduce capital gains tax
- \_\_\_ Provide support to my favorite charities
- \_\_\_ Learn more about the needs of the community
- \_\_\_ Learn more about volunteerism
- \_\_\_ Other

Are you currently working with a tax or estate planning advisor?

\_\_\_ Yes \_\_\_ No If so, whom? \_\_\_\_\_

What is most important to you as you consider your charitable giving?

\_\_\_\_\_  
\_\_\_\_\_

Please describe your past giving experiences (*Have you made mostly small gifts when asked by friends and family to support a cause? Are there specific issues you regularly support and are passionate about? Do you research organizations to give to? Do you give to the same groups annually or find new causes?, etc.*)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Your Gift**

I plan on using the following assets for my gift:

- Cash
- Appreciated securities
- Real estate
- Other \_\_\_\_\_

The timing of my gift is:

- This calendar year
- At a later time during my life
- Upon my death

**Giving Interests**

Please mark all that apply. This information will be used only by the Placer Community Foundation to help us understand your current charitable interest.

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Arts and Culture</b></li> <li><input type="radio"/> Museums</li> <li><input type="radio"/> Visual Arts</li> <li><input type="radio"/> Performing Arts</li> <li><input type="radio"/> Media and Communications</li> <li><input type="radio"/> Arts Education</li> <br/> <li><input type="checkbox"/> <b>Conservation</b></li> <li><input type="radio"/> Natural Resources Conservation</li> <li><input type="radio"/> Land Use Planning</li> <li><input type="radio"/> Botanical and Horticultural Services</li> <li><input type="radio"/> Animal Protection and Welfare</li> <li><input type="radio"/> Environmental Education</li> <br/> <li><input type="checkbox"/> <b>Education</b></li> <li><input type="radio"/> K-12 Schools</li> <li><input type="radio"/> Early Childhood Education</li> <li><input type="radio"/> Higher Education</li> <li><input type="radio"/> Scholarships and Financial Aid</li> <li><input type="radio"/> Adult Education/Literacy Programs</li> <li><input type="radio"/> Libraries</li> <br/> <li><input type="checkbox"/> <b>Health</b></li> <li><input type="radio"/> Hospitals and Clinics</li> <li><input type="radio"/> Family Planning</li> <li><input type="radio"/> Substance Abuse Prevention/Treatment</li> <li><input type="radio"/> Mental Health Services</li> <li><input type="radio"/> Medical and Disease Research</li> <li><input type="radio"/> Medical Equipment</li> <li><input type="radio"/> Prevention</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>United Way/Other Federated Giving Programs</b></li> <br/> <li><input type="checkbox"/> <b>Social Services</b></li> <li><input type="radio"/> Children and Youth Services</li> <li><input type="radio"/> Recreation and Sports</li> <li><input type="radio"/> Residential and Home Care</li> <li><input type="radio"/> Emergency Food Programs</li> <li><input type="radio"/> Youth Development</li> <li><input type="radio"/> Disaster Services</li> <li><input type="radio"/> Child Care</li> <li><input type="radio"/> Domestic Violence Services</li> <br/> <li><input type="checkbox"/> <b>Urban Affairs</b></li> <li><input type="radio"/> Housing Development</li> <li><input type="radio"/> Temporary Housing/Homeless Shelters</li> <li><input type="radio"/> Historic Preservation</li> <li><input type="radio"/> Emergency Material Assistance</li> <li><input type="radio"/> Community/Neighborhood Development</li> <li><input type="radio"/> Economic Development</li> <li><input type="radio"/> Job Training and Placement</li> <li><input type="radio"/> Vocational Rehabilitation</li> <li><input type="radio"/> Crime Prevention</li> <br/> <li><input type="checkbox"/> <b>Specific Interest Area</b></li> <li><input type="radio"/> Senior Citizens/Elderly</li> <li><input type="radio"/> Developmental/Physical Disabilities</li> <li><input type="radio"/> Immigrant/Refugee</li> <li><input type="radio"/> Faith-based giving</li> <li><input type="radio"/> Children</li> <li><input type="radio"/> Women Issues</li> </ul> |
|---|--|

My other interests are:

## Types of Funds:

### I am most interested in the following types of funds:

#### **Unrestricted Fund:**

Used to address a broad range of local needs – including future needs that often cannot be anticipated. Grants are made in the name of the fund established by the donor, creating a personal legacy of giving.

#### **Donor Advised Fund:**

Combines immediate tax benefits with the ability to remain actively involved in suggesting uses for the gift. Grant awards are issued to charities in the name of the fund (or anonymously if preferred). Donor Advised Funds are a simple, powerful, and highly personal approach to giving.

#### **Field of Interest Fund:**

Enables donors to target their gift to address needs in an important area of community life, such as education, the arts, or social services. The Placer Community Foundation awards grants to organizations and programs that are making a difference in the donor's area of interest; so the gift stays flexible enough to meet community needs – even as they change over time.

#### **Designated Fund:**

Established to ensure that support will be provided to specific charitable organizations, often charities with which donors have been involved during their lifetimes.

#### **Scholarship Fund:**

Established by businesses, organizations, families, or individuals to help students – seeking post-secondary education – achieve their lifetime dreams.

#### **Community Fund:**

Also called a geographic affiliate fund, this fund allows you and other members of a community to pool donations and support projects that directly benefit a specific geographic area or region.

#### **Supporting Organizations:**

Establishing a Supporting Organization provides an alternative to private foundations – with only a fraction of the administrative responsibilities. Donors maintain personal involvement and support the causes they care about most, while enjoying the favorable tax treatment of a public charity. Investment management, startup costs, grant administration, and reporting are left to the Placer Community Foundation, a public charity.

#### **Corporate Charitable Fund:**

Simplify corporate giving, and gain some tax advantages, by setting up a corporate charitable fund. The Placer Community Foundation manages fund logistics and can help with grantmaking for your company.

#### **Agency Endowment Fund:**

Create a permanent pool of assets for your nonprofit organization. You can save time by letting the Foundation manage the fund. The income provided by the fund makes nonprofit organizations less dependent on their own future fundraising efforts.

#### **Operating Endowment Fund:**

Established to support the programs and services of the Placer Community Foundation.

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**How did you learn about the Placer Community Foundation?**

A friend (who?) \_\_\_\_\_  
A family member (who?) \_\_\_\_\_  
A professional advisor (who?) \_\_\_\_\_  
An advertisement (in which publication or radio station?) \_\_\_\_\_  
\_\_\_\_\_  
Other (please explain) \_\_\_\_\_

**Additional information, interests or questions**

My main questions or concerns about working with the Foundation are:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Questions? We're Here to Help!**

Contact the Placer Community Foundation at (530) 885-4920.

The Placer Community Foundation, P.O. Box 9207, Auburn, CA 95604 • [www.placercf.org](http://www.placercf.org)

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