PHILANTHROPIC PARTNERSHIP WITH PROFESSIONAL ADVISORS

FOUNDATION FOR THE CAROLINAS

Foundation For The Carolinas offers the highest caliber of philanthropic expertise to help your clients achieve their charitable goals.

Foundation For The Carolinas is honored to work with professional advisors across the Carolinas, providing expert solutions for clients who want to include charitable giving in their financial and estate planning. Our knowledgeable team of experts can help you identify your clients' motivations, provide exceptional philanthropic resources and ensure that each charitable investment has the greatest possible impact for both your client and their beneficiaries.

As the region's philanthropic home, FFTC offers your clients a convenient single point of contact for their charitable contributions, as well as the flexibility to accept a wide range of assets, such as closely held business interests, real property, qualified retirement plan or IRA assets, life insurance proceeds and trust assets. And because we are a public charity, we can help your clients receive maximum tax benefits for income, gift and estate tax purposes.

We welcome the opportunity to meet with you and your clients to discuss the ways we can help them achieve their goals.

Contact us today for more information:

Visit
220 North Tryon Street
Charlotte, NC 28202

Call
704.998.6412
800.973.7244

Email
philanthropy@fftc.org

Learn more
www.fftc.org

A highly responsive team with deep expertise in structuring gifts and providing counsel and guidance

We work to create a seamless partnership, adding philanthropic expertise to the services you provide, always with great respect for the relationship that exists between you and your clients.

We help ensure that your clients receive the full benefit of their charitable contributions and offer expert assistance in creating and implementing charitable plans that are fully integrated with other major business, personal and financial decisions.

We offer unique solutions designed to leverage gifts of closely held business interests and real property, offering both immediate and future tax benefits.

We provide personalized services structured to meet the specific needs of your clients and their families, including services to private foundations.

Our Investment Alliance Program allows you and your firm to retain the investment management of funds created by your clients while working in partnership with FFTC to address your client's charitable objectives.

FFTC Cabinet of Professional Advisors

Cabinet members serve as advocates for philanthropy and act as expert resources in their respective fields.

Edward G. "Woody" Connette
Essex Richards, PA

Stephanie Daniel
Smith Moore Leatherwood, LLP

Daniele Donahoe
Rinehart Wealth & Investment Advisory

David Finnie
Pesta, Finnie & Associates

Debra Foster
Foster Royal, PA

Chris Gammon
Carolinas Investment Consulting

Frank Goins
SunTrust Bank

Jennifer Green
PNC Bank

Kathy Habluetzel
Milburn Services

Paul Hattenhauer
Culp, Elliott & Carpenter, PLLC

Tim Herbst
US Trust, Bank of America Private Wealth Management

Gray Howard
Morgan Stanley

David Inabinett
Brinkley Walser Stoner

Susan Jamison
Wealth Matters, LLC

Chris Jones
Moore & Van Allen

Joy Kenefick
Wells Fargo Advisors

Ken Leahy
PricewaterhouseCoopers

Kerri Mast
Brown Brothers Harriman Trust Company

Graham McGoogan
McGuireWoods

Lauren Millovitsch
Blanco Tackabery & Matamoros, PA

John Norman
GreerWalker, LLP

Holly Norvell
Johnston, Allison & Hord

Tanya Oesterreich
Oesterreich Law, PLLC

Todd Stewart
Stewart Law, PA

Thomas Whitlock
Elliott Davis Decosimo

Laura Yaeger
Attorney at Law

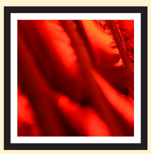
SMART, FORWARD-THINKING
PHILANTHROPIC SOLUTIONS

FOUNDATION FOR
THE CAROLINAS

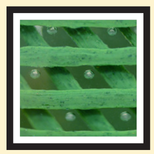
Inspiring The Art of Philanthropy

Funds can be established with a variety of assets, and we make it easy to get started. Call 704.998.6412 or email philanthropy@fftc.org.

FFTC
DONOR ADVISED FUNDS



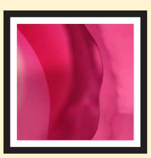
FFTC
AGENCY & DESIGNATED FUNDS



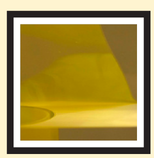
FFTC
SCHOLARSHIP FUNDS

FFTC
CIVIC LEADERSHIP FUND

FFTC
COMMUNITY IMPACT FUNDS

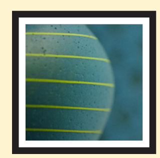


FFTC
FIELD OF INTEREST FUNDS



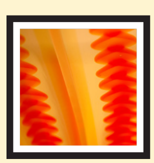
FFTC
SUBSIDIARY FOUNDATIONS

FFTC
PRIVATE FOUNDATION SERVICES

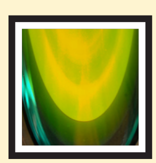


FFTC
CHARITABLE TRUSTS

FFTC
GIFTS OF REAL PROPERTY



FFTC
GIFTS OF BUSINESS INTERESTS



E4E RELIEF
EMPLOYEE RELIEF FUNDS