

## FFTC PLANNED GIVING SOLUTIONS

Partner with Foundation For The Carolinas  
to create your unique legacy

Foundation For The Carolinas partners with generous individuals from across our region who are dedicated to ensuring a positive future for our community. We offer expert guidance, personalized service and local resources to help you establish your unique legacy.

A leader in planned giving since 1958, FFTC works with you and your professional advisors to integrate giving into your estate plan. We help structure estate gifts and create charitable plans that maximize your philanthropic impact.

Our flexible succession plans offer permanent stewardship, and ensure your commitment to the communities and causes you support will be honored for years to come. Whether your goal is to address evolving community needs, support your favorite nonprofits in perpetuity, or engage your family in the experience of philanthropy, FFTC makes it easy and efficient to create an enduring legacy.

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](http://www.fftc.org)

FFTC can help you establish a plan that achieves your philanthropic goals.

### Endow Your Annual Giving

Ensure the causes you support today become a part of your charitable legacy. You can address current and future needs in an area of personal importance by creating an endowed FFTC Designated Fund or FFTC Field of Interest Fund. Creating a lasting gift in your name is a powerful way to give in perpetuity.

### Invest in Your Community's Future

Help address urgent, unexpected and/or changing needs in our region by creating a fund entrusted to your local community foundation's discretion. FFTC Community Impact Funds support regional grantmaking and civic initiatives that seek long-term solutions to problems facing the communities we serve.

Whatever your vision for the future of your community, a charitable fund at FFTC can help make it a reality.

### Create a Family Legacy

FFTC offers a unique combination of personal service, local resources and expert guidance to help you pass the tradition of philanthropy to the next generation. We will work with you to identify shared family values, and to design a philanthropic legacy that ensures your family values are honored by future generations.

*Note: A one-time planned gift fee equal to 0.5% of the value of the realized planned gift will be assessed to support FFTC's charitable work. For funds other than endowed funds, the minimum fee is \$3,500.*

*Information provided is general in nature. It is not intended to be, and should not be construed as, legal or tax advice. Foundation For The Carolinas does not provide legal or tax advice.*



### Power of Legacy

Lucille Puette Giles gave generously throughout her life to a variety of charitable causes. She capped her tradition of philanthropy with an extraordinary, unrestricted bequest of \$35 million to Foundation For The Carolinas in 1996. The endowed gift entrusts FFTC to honor Giles' legacy in perpetuity by addressing ever-changing needs and opportunities in our community.

To date, \$54 million in grants have been awarded to nonprofits from the fund, while maintaining a current market value of more than \$39 million.\*

Gift of  
**\$35M**



**\$54M**  
in Grants\*

\*As of December 2017



We will be known  
forever by the  
tracks we leave.

■  
DAKOTA SIOUX  
PROVERB



## PLANNING YOUR LEGACY

We make it easy to establish your planned gift

1

### EXPLORE The Possibilities

Permanently support my favorite organizations?

Address needs in my community?

Create a philanthropic family legacy?

2

### Work with FFTC to CREATE Your Charitable Plan

Choose your FFTC Gift Fund

Establish your planned gift

Document your charitable intent

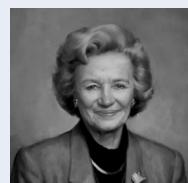
3

### IMPACT Your Community

Whatever your vision for the future of your community, an FFTC Gift Fund can help make it a reality.

#### Ensure Lasting Community Impact

Nell Rose Bates serves as a shining example of an unlikely philanthropist who created a unique and powerful legacy. A school teacher for 40 years, Bates left a \$1.2 million estate gift through her will, establishing the Nell Rose Bates Affordable Housing Fund which ensures safe, affordable housing for our community for years to come.



To plan your own legacy, contact us at **PHILANTHROPY@FFTC.ORG** or **704.998.6412**



### **FFTC COMMUNITY IMPACT FUNDS**

These funds give FFTC the ability to address broad and changing community needs over time, while maintaining the spirit of your gift. This option is a good choice if you value the flexibility and local knowledge FFTC offers to help meet the emerging needs of our region while honoring your philanthropic legacy.



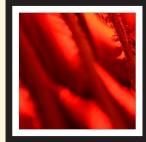
### **FFTC DESIGNATED FUNDS**

These funds are established to help meet the future needs of one or more designated charities in perpetuity. Endowing your designated fund ensures support of that charity forever.



### **FFTC FIELD OF INTEREST FUNDS**

These funds allow FFTC to use your gift to address the needs and opportunities of a specific area of community life. They are flexible enough to fund a variety of organizations as needs change over time and focused enough to create a highly personal and permanent charitable legacy.



### **FFTC DONOR ADVISED FUNDS**

These funds offer you and your family a flexible, efficient way to manage giving with superior tax advantages. You can appoint family members or friends to advise on charitable gifts, in line with your vision.



### **FFTC SCHOLARSHIP FUNDS**

These funds support students from preschool to postgraduate by providing grants for educational purposes, and give you the ability to focus on a specific academic discipline, institution or eligibility criteria. Help students achieve their dreams as part of your giving legacy.



### **FFTC CHARITABLE TRUSTS**

FFTC Charitable Trusts are effective vehicles that provide income or assets for you or your family, while also creating a philanthropic legacy through a permanently endowed fund at FFTC.