

## FFTC CUSTOM PHILANTHROPY SERVICES

Foundation For The Carolinas offers customized services to support the strategic, grantmaking and governance needs of donors.

*Foundation For The Carolinas provides customized services for private foundations, supporting organizations and funds with assets greater than \$2 million. We help families, corporations, private foundations, and community groups achieve their unique philanthropic visions.*

*FFTC Custom Philanthropy Services reduce administrative burdens and maximize philanthropic impact across a variety of charitable vehicles.*

*Whether you have a long history of giving or are just beginning to create your legacy, FFTC tailors each relationship to meet your needs with highly personalized support.*

*Our holistic approach, full spectrum of back-office support, and philanthropic expertise makes the art of giving both easy and impactful.*

**Contact us today  
for more information:**

### Visit

220 North Tryon Street  
Charlotte, NC 28202

### Call

704.998.6412

### Email

philanthropy@fftc.org

### Learn more

www.fftc.org

## FFTC Custom Philanthropy Services

FFTC offers turn-key solutions to meet the unique needs of private foundations, supporting organizations and larger funds. We engage donors to identify philanthropic missions, and to implement grant programs that support causes of interest. Our extensive expertise and deep knowledge of community needs help you make the greatest possible impact.

### Philanthropic Strategy

- ▶ Craft and design a philanthropic mission, transforming your values into impact
- ▶ Develop a giving plan tailored to your interest areas and philanthropic priorities
- ▶ Structure processes to implement and uphold your vision in perpetuity

### Grantmaking and Impact

- ▶ Design grantmaking guidelines and implement programs to carry out your philanthropic mission
- ▶ Research, evaluate and recommend organizations that fit your charitable interests
- ▶ Facilitate grantmaking requests and field inquiries
- ▶ Evaluate and report on grantee effectiveness

### Governance and Succession Planning

- ▶ Manage board governance structure
- ▶ Plan and facilitate committee or board meetings
- ▶ Create bylaws and orient new board members
- ▶ Develop a plan for succession to the next generation or criteria for new leadership

### Finance, Investment and Accounting

- ▶ Maintain and prepare financial records
- ▶ Counsel on investment strategy and create tailored investment solutions
- ▶ Receive, manage and administer illiquid assets
- ▶ Track excise tax and payout requirements
- ▶ Prepare and file federal and state returns

## Your FFTC Team

FFTC Custom Philanthropy Services provide highly personalized support.

Our philanthropic experts are available to consult with you and your family, your company or your private foundation.

We provide custom services for the following philanthropic vehicles:

### FFTC Donor Advised Funds

A flexible, efficient way to manage giving with superior tax advantages

### FFTC Field of Interest Funds

Allow you to address the needs and opportunities of a specific area of community life

### FFTC Supporting Organizations

An excellent alternative to a private foundation – with only a fraction of the administrative responsibilities

### FFTC Private Foundation Services

Reduce the cost and burden of running an independent organization

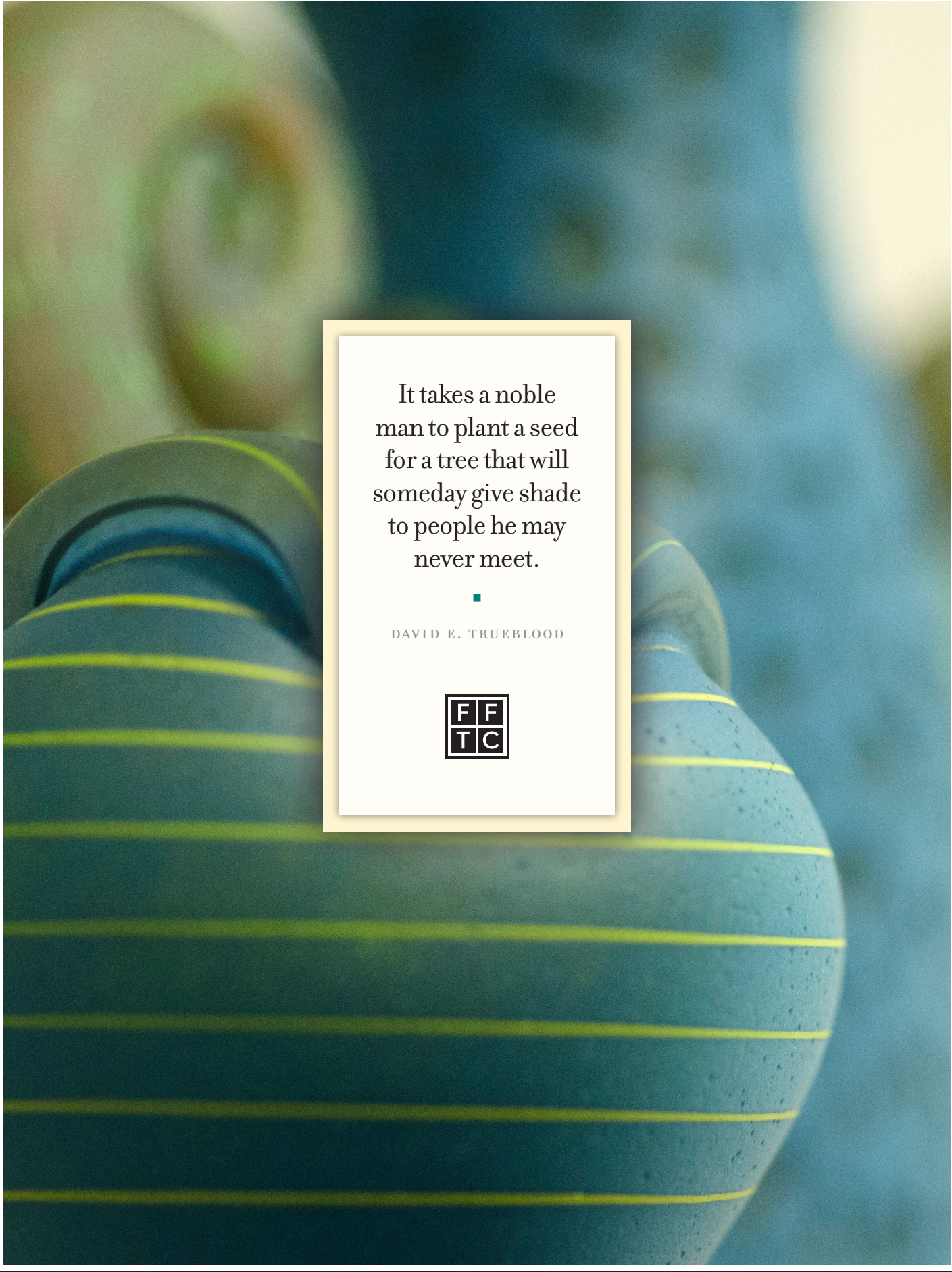
### Fees and Opening Minimum:

*Custom services are available to private foundations, supporting organizations and funds with assets greater than \$2 million. Fees are asset-based, tiered and determined by the scope of services.*

*Philanthropy is an art  
that benefits everyone.  
Come be inspired.*

**FOUNDATION FOR  
THE CAROLINAS**





It takes a noble  
man to plant a seed  
for a tree that will  
someday give shade  
to people he may  
never meet.



DAVID E. TRUEBLOOD

