

# CHARITABLE FUNDS

Great giving options. Choose the one that is right for you.



**AGENCY FUNDS.** Agency Funds are typically established at the request of a charitable organization to provide support for the Agency's exempt purposes, as recommended by the Agency. The Agency's recommendations are advisory only, and Legacy Foundation is free to reject any recommendations.

**DESIGNATED FUNDS.** Direct charitable gifts to benefit a specific nonprofit organization or purpose. Gifts provide an ongoing funding stream for eligible nonprofit organizations in the United States. Nonprofit organizations may also begin their own Agency Endowments with Legacy Foundation, using our capabilities to accept complex gifts and to build a lasting endowment.

**DONOR ADVISED FUNDS.** The donor enjoys ongoing involvement by working with our staff to identify possible grants that may benefit a variety of causes and organizations. The donor's recommendations are submitted to our local board for approval, and grants are distributed in the name of the fund.

**FIELD OF INTEREST FUNDS.** Focus on an important area of community life, such as enriching education, safeguarding health, strengthening families, improving neighborhoods, cultivating arts or protecting the environment. The donor identifies a personal interest when making a gift; Legacy Foundation's board awards grants to community organizations and programs that are making a difference in the area selected.

**SCHOLARSHIPS.** Help students achieve their academic and career-oriented goals—from preschool to postgraduate work. With support and guidance from Legacy Foundation, donors can invest in the community's future through scholarships. Donors may determine the criteria students must meet to receive the scholarship.

**UNRESTRICTED FUNDS.** Unrestricted gifts empower Legacy Foundation to make strategic grants, where need and opportunity are greatest. Legacy Foundation's staff and Grants Committee evaluate all aspects of community wellbeing—arts and culture, economic development, education, environment, health and human services, neighborhood revitalization and more.

## ESTABLISH A NAMED FUND

Any of these funds can be established in the donor's name or in the name of the donor's family, or business. Donors can also choose to honor a loved one by establishing one of these funds as a Memorial Fund. All grants made—today and in the future—are awarded to charities in the name of the fund. It's a special way to link community investment with a special person or purpose, forever.



Lake County's Community Foundation

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