



# BUILDING COMMUNITY, LEAVING LEGACIES

*“An endowment fund is like a spring filling a pond. It continues to fill over and over again and doesn’t disappear.”*

—Marion Wright (1920–2011) former CFO  
Board Member and fund establisher



## COMMUNITY FOUNDATION *of the* OZARKS

*Connecting passion to purpose.*

For more information about the Community Foundation of the Ozarks and its programs and services, please contact the Donor Relations Department.

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P.O. Box 8960  
Springfield, MO 65801  
(417) 864-6199

### How to Donate:

It’s easy to donate to your favorite charities through the CFO. Send a check to:

Community Foundation of the Ozarks,  
P.O. Box 8960, Springfield, MO 65801

Please note the intended recipient of your donation on your check.

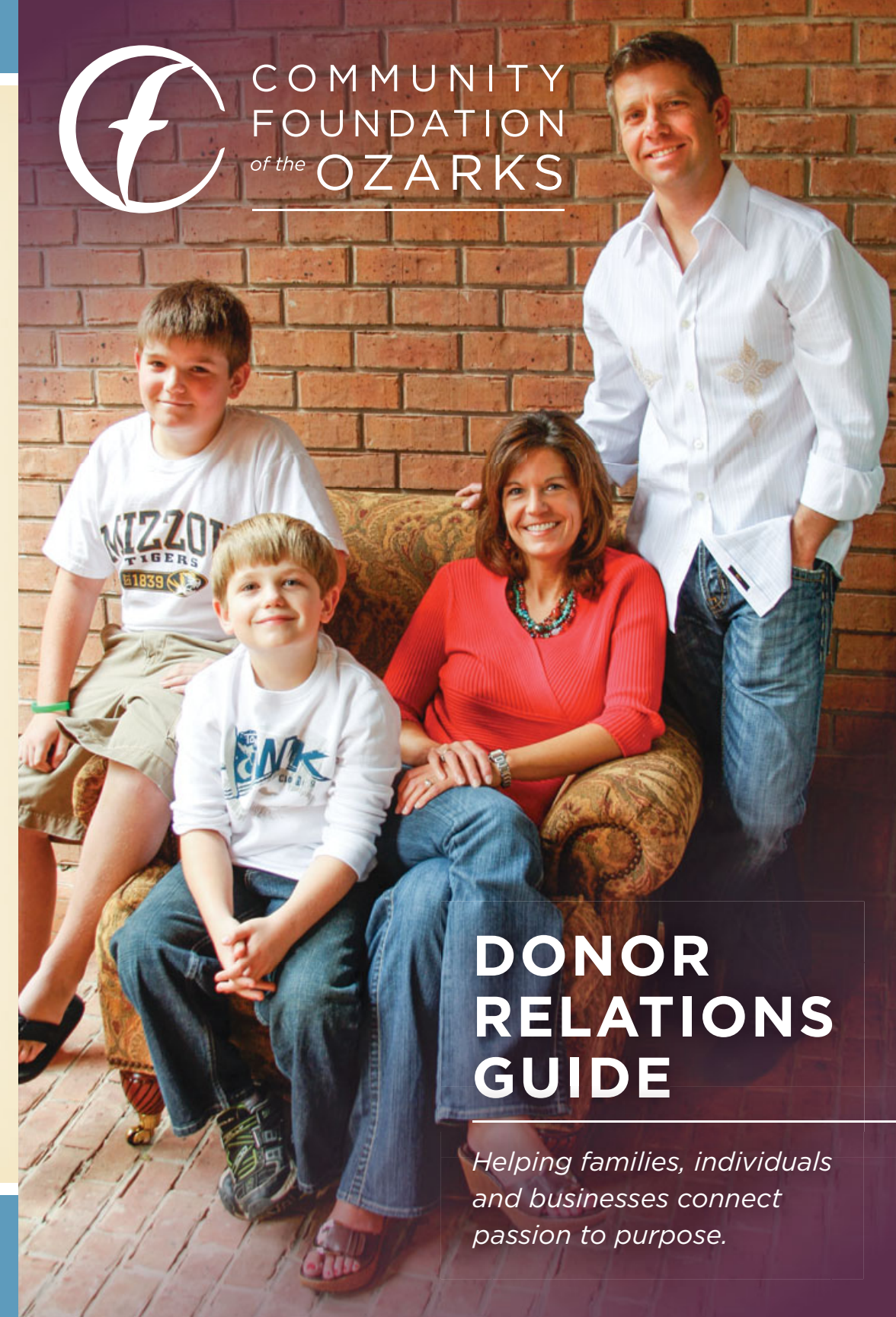
Donate online: [www.cfozarks.org/donate](http://www.cfozarks.org/donate)  
Please note the recipient in the “Fund/  
Program” box.

All donations are tax deductible to the fullest extent allowed by the IRS.

We advise donors to work with advisors or attorneys to determine the best fit for their overall financial goals.



COMMUNITY  
FOUNDATION  
*of the* OZARKS



## DONOR RELATIONS GUIDE

*Helping families, individuals  
and businesses connect  
passion to purpose.*

[CFOZARKS.ORG](http://CFOZARKS.ORG)





# GIVING WITH PURPOSE

*“I learned very early that dad was emphatic about us being good stewards in our community since the community was very good to us.”*

*—Donald G. Martin, Sr., son of E.A. Martin, Jr.*

*On the cover: Doug and Gina Jordan with their sons, Dylan and Jake*

*Above: Moxie Mornings*

## ABOUT THE COMMUNITY FOUNDATION OF THE OZARKS

The Community Foundation of the Ozarks is a public foundation serving the Missouri Ozarks. The CFO is dedicated to working with donors, nonprofit partners, and affiliated community foundations in meaningful and purposeful ways.

The Foundation’s mission is to enhance the quality of life in our region through resource development, community grantmaking, collaboration, and public leadership.

Founded in 1973, CFO has since grown to include 44 affiliate community foundations and more than 2,500 charitable funds totaling approximately \$210 million in assets.

## OUR COMMITMENT

Community Foundation of the Ozarks is committed to recognizing, informing and engaging donors through a variety of means in an effort to strengthen outreach and philanthropy in our region and beyond. Our goal is to provide you with customized service that will allow you to realize your charitable goals.

## EDUCATION

Through CFO’s unique position in the community, our mission is participating in community forums related to the health and vitality of our area. We will provide donors with timely information so that they can make decisions based upon the best practices and community need. The CFO engages with a wide network of nonprofits and also has access to many resources to help inform and educate. Because of these resources, we can provide the following:

- Opportunities for nonprofit engagement;
- Ascertainment of community needs;
- Funders Forum for collaborative/partnership possibilities.

## GRANTMAKING

Working with the CFO presents an opportunity to strategically choose charities to support. Ensuring your grant dollars have the most profound impact is important and we are here to help you identify and vet specific charities. We can offer a host of services to help you with the grant process by:

- Identifying nonprofits that align with your goals and priorities;
- Providing due diligence in ascertaining organizational stability;
- Processing requests and issuing grants;
- Providing grant progress reports;
- Coordinating site visits to organizations as well as presentations.

## FAMILY PHILANTHROPY

A part of strategic philanthropic planning may include engaging family in the process. Sharing interests, passion and legacy with one’s children is an opportunity to create a sense of ownership and share the value of giving back. The CFO can assist with discussions defining a family’s value statement or mission statement to guide charitable priorities. Once family interests are determined, the CFO can help bring clarity to the process of charting a course for grantmaking. The passing along of traditions, while creating the space for new ideas, helps honor the views of mature family members and establishes bridges between generations for what matters most to each. The CFO is engaging in conversations with next



*Peggy and Marvin Johnson opened a Donor-Advised Fund for charitable giving.*

generation philanthropists to help identify their interests, values and ideas to better understand their charitable passions.

## PLANNING FOR THE FUTURE

Another piece of the philanthropic puzzle is planned giving, which gives donors the opportunity to create a vehicle to support the passions they have today into an unknown future. Research indicates there will be a significant transfer of wealth over the next few decades. Creating a planned gift can ease the dilemma of what charities to support for the donor and his/her family now and for perpetuity. The Community Foundation of the Ozarks can help with the legacy an individual would like to leave, making it simple for all involved. Finding the time and place for the next generation to discover their voice, while respecting those who have created the wealth, is a responsibility we embrace and look forward to discussing with donors, prospective donors and their families.

## ADMINISTRATIVE SERVICES

When establishing a fund with the CFO, donors can expect to receive the utmost attention to fund administration for the “back office” services. It is important to the CFO that donors know the business of the organization is impeccable and we are proud of a long tradition of unqualified audits and successful fund management. We provide our donors with the following services:

- Tax acknowledgement letters;
- Quarterly fund statements;
- Fund information online via Donor Central;
- Appreciated stock and real estate gift acceptance;
- Proven investment performance.

## TAILORED FUNDS

Donors are able select from a variety of options based upon their interests and financial goals when establishing a fund.

Below is a list of fund possibilities:

**Traditional Donor Advised Fund**—All monies placed in this fund will be considered principal and will not be touched, as this is a traditional endowment fund. Four percent of the fund’s balance will be available for grants each year into perpetuity. This fund will be invested in our fully diversified asset allocation.

**Flexible Donor Advised Fund**— This endowment fund must maintain a \$25,000 balance into perpetuity. All monies above that would be available for grants. This fund will be invested in our fully diversified asset allocation.

**Family and Community Fund**— This fund is not

endowed. Once it reaches \$2,500, it may be spent down to a zero balance through grantmaking. This fund may be invested in our fully diversified asset allocation or our cash account, currently earning 1.25 percent.

**Designated Fund**— This type of endowment is designed to support a specific program, organization or institution. The fund will grant to the donor’s designated charity or charities. It will be invested in the fully diversified asset allocation.

**Field of Interest Fund**— This fund is designed to grant to any number of organizations within a particular charitable field or sector such as education, arts, human services, etc. It provides some flexibility to meet emerging needs of an interest area in the future. This fund, too, is invested in the diversified asset allocation.

*\* There is no required amount to be distributed annually through any CFO fund.*

*\*\* Successor advisors or grantees may be named and/or changed at any time.*

*Ozark High School’s annual scholarship reception links donors and students.*

