



Community
Foundation
Ireland

Supporting Your Clients on their Philanthropic Journey

Philanthropy Guide for
Professional Advisors & Family Offices

For change. For better. For all.

“Professional Advisors are increasingly aware that a Donor Advised Fund is a great alternative to establishing a charity or writing a cheque. The Foundation allows families to engage in philanthropy with ease.”

– Nora Lillis, Gartlan Furey



Philanthropic Giving

Entering the world of philanthropy is like embarking on a journey. Knowing how and where to give to maximise impact requires experience and expertise. Interest, knowledge and engagement in philanthropy is ever growing. Whether your clients are new to, or experienced in strategic giving, we are here to support donors to best achieve their philanthropic goals.

Equality for All in Thriving Communities

With our mission of equality for all in thriving communities, Community Foundation Ireland works with donors to support their philanthropic giving. We provide donors with the most impactful route to giving through our wide range of products. We work with over 5,000 charity and community organisations who are working to shape an Ireland that delivers change for those who need it most. We are dedicated to creating positive transformative impact in communities all over Ireland.

Unique Solution to Your Clients Charitable Giving

As a trusted advisor playing a crucial role in guiding your clients through complex financial decisions, your clients may want to learn more about the important and rewarding role philanthropy can play in their choices.

As a philanthropic hub, we provide support, solutions and options, including Donor-Advised Funds, Endowment Funds and managing Legacy Gifts. We work with a full range of professional advisors and family offices to provide expert philanthropic fund management services to support clients to have a real and positive impact on the key issues facing our society.

For change. For better. For all.

Our Impact

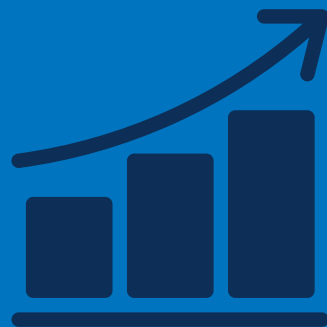
€160
million

in Total Grants



€50 +
million

*in Community
Foundation Ireland
Endowment Fund*



Connectivity with

5,000

*voluntary, charitable
and community partners*



Full Philanthropic Management Service

Our expert Philanthropy Management Services provides donors with a full service offering, from identification of charitable causes and projects through to regulatory compliance, strategic grant making and effective reporting. There are multiple benefits to partnering with Community Foundation Ireland, including:

- **De-risking philanthropic investment:** Our expert Grants and Donor Care Team conduct due diligence on all charitable organisations considered for funding.
- **Capturing & communicating impact:** We capture key insights from grant-making activities and help communicate these impacts.
- **Identifying funding opportunities:** We are connected to the pulse of Irish communities. Our network of 5,000 community partners provide insights to optimise the impact of philanthropic investments.



**Strategic
Giving Vehicles**



**Due
Diligence**



**Support
& Advice**

Your Clients and their Philanthropic Giving

Strategic, philanthropic giving is becoming an important choice for many people. Your clients may have varying needs around philanthropy including:

- Seeking advice on how philanthropy works
- Have a lump sum to donate
- Want to start a philanthropic fund
- Fund ready-to-go projects
- Have their own foundation and want guidance on how to truly move the dial on a certain social issue
- Leave a legacy gift
- Engage the next generation
- Wish to give back to a particular place, often where they were born.

Community Foundation Ireland can provide expert advice and guidance in this wide range of areas. Even donors who have gained considerable experience and understanding of philanthropy may require support to re-evaluate and refresh their giving to best achieve their philanthropic goals.

No matter what the needs of donors are, we know that each donor wants to have a positive impact on communities all over Ireland.





Strategic Giving Vehicles

Set up a Donor Advised Fund (DAF) – Flow Through or Endowment

This tailored, private, giving vehicle is ideal for those who wish to pursue personal charitable interests, as well as those wishing to avoid administrative burden and costs associated with starting their own Foundation. Donors will benefit from the grant-making expertise Community Foundation Ireland offer.

Flexibility is key to this offering, including the donation amount, duration of investment and engagement, sharing of decision making with family, as well as choices in relation to privacy.

Endowment Funds

Central to driving long-term impact are endowment funds as they ensure grant-making in perpetuity. The sustainability of this type of funding lies in the fact that the principal capital of the donation is preserved and reinvested each year. A real rate of return over the long-term is earned, helping to preserve and grow the original capital to benefit future generations to come.

On an annual basis, a percentage of the value of the fund is drawn down to grant-make to programmes and projects. This type of funding provides a consistent and sustainable annual income for grant-making to projects that may not otherwise happen and operating costs of the Foundation.

Donate to Community Foundation Ireland Fund

Supporting an existing fund is highly strategic and facilitates a collaborative and effective way to give. Donations will be pooled with other likeminded donors for maximum impact.

Leave a Legacy Gift

In making a bequest to Community Foundation Ireland, donors ensure that positive change in communities can happen, now and into the future. Legacy gifts to Community Foundation Ireland are invested into the Foundations' endowment fund, a secure long-term fund, ensuring grant-making in perpetuity.



Long-Term Impact of a Generous Family through Endowment Giving

A generous Irish family set up a significant fund with Community Foundation Ireland after the sale of a business to support their wish to give back and enhance the philanthropic journey of the family members into the future.

“When I sold the company, we made a family decision to split the pot 3 ways: a third for charitable activities, a third to the kids and a third for my wife and I.”

Given the time and cost entailed in setting up a family foundation, they chose the Community Foundation Ireland Endowment Fund as the best route for their philanthropic investment. It offers them flexibility in their grant-making, an ability to include all members of the family and to ensure their giving continues into the future.

“We decided to set it all up with Community Foundation Ireland for less than one tenth the cost of doing it ourselves.”

The family took a strategic view of social impact, which was key to their grant-making commitments to projects that addressed the root causes of issues to help identify and implement solutions, rather than providing a short-term fix. Their areas of focus include penal reform, violence against women, child safety, education, all-island work, and poverty.

Examples of the impact their fund is having include:

- Supporting housing and food for hungry families in emergency centres for over a decade
- Bringing music, colour and fun into the lives of sick children, people living with dementia and other serious illnesses.
- Supporting groundbreaking research into gender-based violence.
- Supporting the successful widening of a national debate around consent, pushing for policies which confront violence in the home.

With annual returns for grant-making, they know the difference they are making will grow and strengthen for decades to come, leaving a true family legacy.



Together, We Can Achieve More

About Us

Community Foundation Ireland is a leading philanthropic organisation with a clear mission - equality for all in thriving communities. Our team is dedicated to building an equal and better future. We provide a trusted source of expertise for individuals, families and organisations who are looking to maximise the impact of donations.

Based on the long-standing and successful model of international community foundations, we provide expertise, networks and knowledge that supports donors to have a positive impact through their giving.

We connect donors, grantees and communities to support equality. In partnership with you, we can accomplish even more, together. You and your clients can have a positive impact and drive change in communities all over Ireland.

For change. For better. For all.

Get In Touch

We welcome the opportunity to work with you at any stage of a client's philanthropic journey. Whether you would value a confidential conversation, specialist philanthropy advice, a joint meeting with your client or a *Lunch & Learn* session for you and your team to hear more insights into philanthropy, our team in Community Foundation Ireland are delighted to support you.

You can call us on +353 (0)1 8747354 or email the Development Team on giving@foundation.ie to explore how we can help you and your clients deliver meaningful, structured giving options for your clients.

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