

Donor Services

We have two levels of service– all donors receive the standard service options offered at the Essential level, while donors that participate in our Personalized services receive our more robust customized philanthropic services.

Service Options	Essentials	Personalized Philanthropic Services
PHILANTHROPIC PLANNING		
Philanthropic advisor assigned to fund	•	•
Annual philanthropic fund review meeting	•	•
Values and interests exploration	•	•
Facilitated philanthropy strategy sessions with wealth advisors		•
Development and implementation of strategic philanthropic plan		•
Facilitated family meetings		•
Family timeline, genograms and family trees		•
Development of mission and vision statements		•
Preparation and management of philanthropic budget		•
EDUCATION		
Access to impact strategies focused on metro Atlanta region	•	•
Invitation to donor events and tours	•	•
Customized educational seminars	•	•
Connection to peers with similar interests, including donor collaborative funding groups	•	•
Access to philanthropy communications	•	•
Personalized nonprofit visits		•
Member-level participation in regional and national philanthropy conferences		•
GRANTMAKING AND EVALUATION		
Access to Community Foundation’s nonprofit library of reports	•	•
Extra Wish (catalog of giving opportunities)	•	•
Due diligence on all grants recommended	•	•
Complete grantmaking and evaluation services		•
Requests for proposals and solicitation		•
Grant docket development		•
Complete proposal review and vetting		•
Customized site visits		•
Grant distribution and awards		•
Grant evaluation		•
Customized funding recommendations		•
Customized issue reports		•
Customized organization reports		•
Access to expert staff with regional program and policy expertise		•

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Service Options <i>(continued)</i>	Essentials	Personalized Philanthropic Services
LEGACY AND SUCCESSION		
Succession planning	•	•
Deferred gift strategy consultation	•	•
Legacy statement preparation		•
ONLINE SERVICES		
Access to Donor Central – online platform with fund and foundation information	•	•
FINANCE AND INVESTMENT		
Audited financial statements	•	•
<i>Access to one of four investment options:</i>		
(1) Community Foundation Investment Pool	•	•
(2) American Funds	•	•
(3) Conservative Option	•	•
(4) Individually Managed Option (\$5,000 minimum investment fee)		•
NEXT GENERATION		
Planet Philanthropy (program for children and teens)	•	•
Customized training for next generation		•
Youth Philanthropy (programs at area schools; Junior Achievement Philanthropy Store)		•

ABOUT US

Since 1951, the Community Foundation for Greater Atlanta has been a trusted philanthropic resource for our 23-county metro Atlanta region. We do this through our mission of providing quality services to donors and innovative leadership on community issues.



To establish a fund at the Community Foundation for Greater Atlanta, please contact Christy Eckoff, director, gift planning at ceckoff@cfgreateratlanta.org or call 404.588.3183.