

Donor Services

Service Options

Essential Services

Customized Philanthropic Services



PHILANTHROPIC PLANNING

Philanthropic advisor assigned to your 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 philanthropic mission and vision statements		•
Preparation and management of your philanthropic budget		•



EDUCATION

Access to TogetherATL strategies focused on Atlanta region	•	•
Invitation to exclusive donor events and tours	•	•
Invitation to educational seminars	•	•
Connection to peers with similar interests, including donor collaborative funding groups	•	•
Access to communications with philanthropic stories, resources and tools	•	•
Personalized nonprofit site visits		•
Member-level participation in regional and national philanthropy conferences		•



LEGACY AND SUCCESSION

Succession planning	•	•
Deferred gift strategy consultation	•	•
Legacy statement preparation		•



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GRANTMAKING AND EVALUATION

Access to Community Foundation's nonprofit library of reports	•	•
Annual <i>Extra Wish</i> giving opportunity catalog	•	•
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		•
Customized reports on organization or issues in our community		•
Access to expert staff with regional program and policy expertise		•



ONLINE SERVICES

Online Donor Toolkit with philanthropic resources	•	•
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FINANCE AND INVESTMENT

Audited financial statements	•	•
Access to one of four investment options:		
(1) Community Foundation Investment Pool	•	•
(2) American Funds	•	•
(3) Conservative Option	•	•
(4) Individually Managed Option (\$5,000 minimum annual administrative fee)		•



PhilanthropyATL

PhilanthropyATL events and materials for children and teens	•	•
Customized training and materials for your family's next generation		•