



Creating a Personalized Social Investment Strategy For Private Foundations

We are deeply grateful for philanthropic efforts of personal foundations. Your generous commitment to community can have a significant impact for both the foundation members and the recipients – if properly invested. Take the guesswork out of developing your charitable giving strategy as part of your investment plan.

Your local United Way can help you make wise charitable giving plan.

United Way's Social Impact Guarantee

The United Way invests in our region's top social agencies and initiatives providing the greatest impact in our local community, solving unignorable issues such as child poverty, unemployment, mental health, and domestic violence.

We say this with confidence because all funding requests undergo a rigorous three-stage process, managed by our knowledgeable and dedicated **Community Investment Advisory Committee (CIAC)**. The top social agencies who successfully receive United Way investment are mandated to set targets so that progress can be monitored, and **Return on Impact (ROI)** measured.

Last year, 93% of the social agency targets set were achieved or exceeded!

We also protect our investments by providing access to talent from the business community, and support to build capacity, strengthen leadership and foster good governance.

One Private Foundation's Story: *"Our longstanding foundation, governed by four board members, had traditionally always granted to university and hospital capital projects. We were interested in granting to social charities, but did not know where to begin. With the help of our United Way advisor, we narrowed down our interests to children's education programs in Charlotte County. We were so impressed with her recommendations that we decided to commit \$50,000 per year for three years. It feels good knowing we're having a significant impact in our local community."* – Anonymous Private Foundation

The MacMurray Family Foundation's Story: *"Many years ago, my father established a small private foundation. Today, family members continue to operate the foundation, which I am fortunate to chair. Making the disbursement decisions each year can be as challenging as it is rewarding. The United Way provides a structured way to compare projects to make the best decision. We then choose the one that fits best with our interests. It gives me confidence to know that the United Way staff are working directly with the charity to ensure everyone succeeds."* – Ann MacMurray Cox, of the MacMurray Family Foundation

It's Easy To Get Started

It's easy to get on the path to setting up your foundation's social impact portfolio.

Step 1: Get informed - Have an initial conversation with a United Way advisor to find a fit between community needs and your personal charitable interests.

Step 2: Make a plan - Select the charitable investment portfolio that is right for your foundation. Options may include annual or multi-year commitments.



Step 3: Monitor and manage - Monitor the impact of your foundation's social investment through bi-annually, or an agreed upon, project portfolio update.

The United Way's Value Proposition

Give through the United Way with confidence, assured your gift will be invested in the best social support agencies having the greatest impact in changing local lives.

- We work with community organizations, government, and other funders to identify priorities for the community and for investment.
- We review all aspects of the potential funding recipient.
- We leverage funding from other sources to optimize impact.
- We protect investments by helping charities be resilient and effective.
- We monitor and manage your investments to maximize performance.
- We report on the performance of your investments.

Gifts of Securities

Gifts of securities are a tax-smart way to donate to charities. This is something to keep in mind when making a donation. When you sell a security, you pay tax on 50% of the capital gain. However, if you donate a gift of securities to the United Way, the taxable capital gain is eliminated and you receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way receives the security – multiplying the impact of the tax benefit of your charitable giving. Please provide United Way with information about the number and type of shares to ensure we attribute the gift to the correct individual.

Recognition

Everyone likes to be recognized differently for their gifts. The United Way will design an individualized recognition plan that's right for your foundation.

Get Started Today

Thank you for learning about our **Social Investment Advisory Services**. Call Alexya Heelis, United Way's Executive Director, at 506.658.1214 to get started today.