

FFTC PLANNED GIVING SOLUTIONS

FOUNDATION FOR
THE CAROLINAS

Your Vision. Your Impact. Your Legacy.

Whether your goal is to address evolving community needs, support your favorite nonprofits in perpetuity, or engage your family in the experience of philanthropy, Foundation For The Carolinas offers expert guidance, personalized service and local resources to help you establish your philanthropic legacy.

A leader in planned giving since 1958, FFTC works with you and your professional advisors to integrate giving into your estate plan. We help structure estate gifts and create charitable plans that maximize your philanthropic impact.

Our flexible succession plans offer permanent stewardship, and ensure your commitment to the communities and causes you support will be honored for years to come.

Contact us today
for more information:

Visit
220 North Tryon Street
Charlotte, NC 28202

Call
704.998.6412

Email
philanthropy@fftc.org

Learn more
www.fftc.org

FFTC can help you establish a plan to ensure your unique legacy.

Endow Your Annual Giving

Ensure the causes you support today become a part of your charitable legacy. You can address current and future needs in an area of personal importance by creating an endowed FFTC Designated Fund or FFTC Field of Interest Fund. Endowments exist in perpetuity and are a powerful way to leave a lasting gift.

Invest in Your Community's Future

As time passes, your community's most compelling issues will evolve. By leaving a portion of your planned gift to an unrestricted FFTC Community Impact Fund, you can entrust FFTC to address unexpected community needs and opportunities, ensuring permanent, strategic support for the causes you most value, even as needs and organizations change.

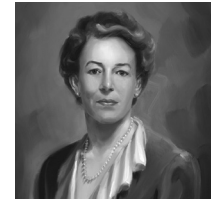
We can't predict what challenges our community will face. But you can ensure that, together, we'll be ready to respond.

Create a Family Legacy

FFTC offers a unique combination of personal service, local resources and expert guidance to help you pass the tradition of philanthropy to the next generation. We will work with you to identify shared family values, and to design a philanthropic legacy that ensures your family values are honored by future generations.

Note: In addition to ongoing published administrative fees, a one-time planned gift fee equal to 0.5% of the value of the realized planned gift will generally be assessed to support FFTC's ongoing planned giving work, including stewardship, administration and grantmaking. For funds other than endowed funds, the minimum fee is \$3,500.

Information provided is general in nature. It is not intended to be, and should not be construed as, legal or tax advice. Foundation For The Carolinas does not provide legal or tax advice.



Power of Legacy

Lucille Puette Giles gave generously throughout her life to a variety of charitable causes. She capped her tradition of philanthropy with an extraordinary, unrestricted bequest of \$35 million to Foundation For The Carolinas in 1996.

The endowed gift entrusts FFTC to honor Giles' legacy in perpetuity by addressing ever-changing needs and opportunities in our community.

To date, \$59 million in grants have been awarded to nonprofits from the fund, while maintaining a current market value of more than \$35 million.*

Gift of
\$35M
↓
\$59M
in Grants*

*As of November 2023

We will be known
forever by the
tracks we leave.



DAKOTA SIOUX
PROVERB



1 EXPLORE The Possibilities

Permanently support my favorite organizations?

Address needs in my community?

Create a philanthropic family legacy?

2 Work with FFTC to CREATE Your Charitable Plan

Choose your FFTC Gift Fund

Establish your planned gift

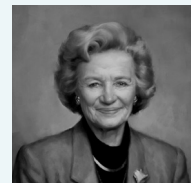
Document your charitable intent

3 IMPACT Your Community

Whatever your vision for the future of your community, an FFTC Gift Fund can help make it a reality.

Ensure Lasting Community Impact

Nell Rose Bates serves as a shining example of an unlikely philanthropist who created a unique and powerful legacy. A school teacher for 40 years, Bates left a \$1.2 million estate gift through her will, establishing the Nell Rose Bates Affordable Housing Fund which ensures safe, affordable housing for our community for years to come.

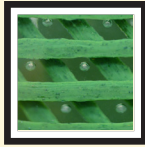


To plan your own legacy, contact us at philanthropy@fftc.org or 704.998.6412



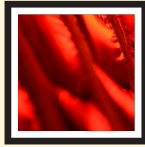
FFTC COMMUNITY IMPACT FUNDS

These funds allow you to address broad community needs and opportunities by leveraging FFTC's discretionary grantmaking expertise and local knowledge. Leave an unrestricted gift to an endowed Community Impact Fund and ensure permanent, strategic support for the causes you most value, even as circumstances and nonprofits change over time.



FFTC DESIGNATED FUNDS

These funds are established to help meet the future needs of one or more designated charities in perpetuity. Endowing your designated fund ensures support of that charity forever.



FFTC DONOR ADVISED FUNDS

These funds offer you and your family a flexible, efficient way to manage giving with superior tax advantages. You can appoint family members or friends to advise on charitable gifts, in line with your vision.



FFTC FIELD OF INTEREST FUNDS

These funds allow you to address the needs and opportunities of a specific area of community life, as designated by you. They are flexible enough to fund a variety of organizations and focused enough to create a highly personal and permanent charitable legacy, while leveraging FFTC's discretionary grantmaking expertise and local knowledge.



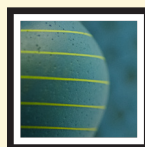
FFTC SCHOLARSHIP FUNDS

These funds support students from preschool to postgraduate by providing grants for educational purposes, and give you the ability to focus on a specific academic discipline, institution or eligibility criteria. Help students achieve their dreams as part of your giving legacy.



FFTC CHARITABLE TRUSTS

FFTC Charitable Trusts are effective vehicles that provide income or assets for you or your family, while also creating a philanthropic legacy through a permanently endowed fund at FFTC.



FFTC CUSTOM PHILANTHROPY SERVICES

FFTC offers turn-key solutions to meet the unique needs of private foundations, supporting organizations and larger funds. We engage donors to identify philanthropic missions, and to implement grant programs that support causes of interest.