



San Diego Symphony

USS Midway Museum Foundation

San Elijo Lagoon Conservancy

PLANNED GIVING PARTNERSHIP

Supporting San Diego's Nonprofit Community



The San Diego
Foundation

A foundation for your passion



Interfaith Community Services



San Diego Natural History Museum

The San Diego Foundation is committed to the success of San Diego's nonprofit organizations, and believes they are key in sustaining and enhancing the region for future generations.

One way The San Diego Foundation supports nonprofits is through partnerships that assist them in their endowment-building and planned giving efforts. There are a number of services available to help nonprofits find success in these areas.

ENDOWMENT-BUILDING

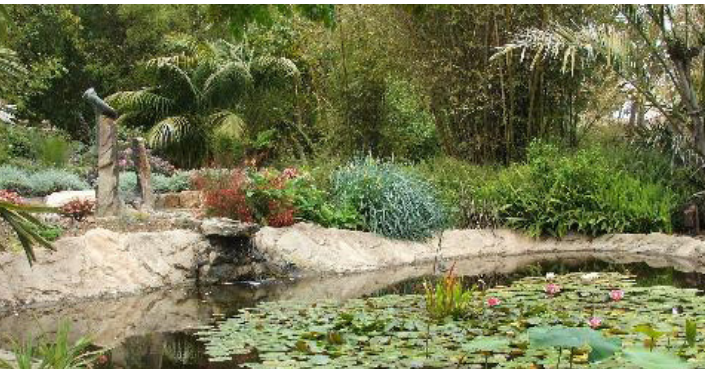
We manage over 150 nonprofit endowments and have the expertise with an in-house Chief Investment Officer who oversees the management of such endowments. With this, nonprofits can be confident in establishing their endowments and also offering their donors designated named endowments for their organizations at The San Diego Foundation. Many donors especially like designated endowment for long-term oversight on nonprofits.

ACCESS TO PLANNED GIVING SPECIALIST

Many nonprofits are not able to have on staff the extensive expertise to respond to planned giving questions. The San Diego Foundation employs a Certified Specialist in Planned Giving, who can provide information on potential gifts of real estate, charitable gift annuities, charitable trusts, and various tax laws. Our specialist is also available to attend donor meetings as appropriate.

PROFESSIONALLY PREPARED GIFT ILLUSTRATIONS

Using specialized planned giving software, The San Diego Foundation is able to create illustrations and simple graphics of various planned giving opportunities. The document includes the gift amount, charitable deduction amount, tax implications and a comprehensive description of the



San Diego Botanical Garden



The Arc of San Diego

specific planned gift and how it works. These illustrations are provided free of charge to local nonprofits for use with their donors. Donor names can remain confidential.

CHARITABLE GIFT ANNUITY PROGRAM

In exchange for an asset, such as cash or appreciated stock, Charitable Gift Annuities (CGAs) provide a fixed income stream for donors and at the same time benefit their favorite charity. Nonprofits who want to offer this popular planned giving option are required to have a CGA license by The State of California's Department of Insurance. Instead, nonprofit partners can access The San Diego Foundation's CGA license. More than 25 nonprofits have taken advantage of this opportunity.

CHARITABLE TRUSTS

As a partner of The San Diego Foundation, nonprofits have access to lower management fees on Charitable Trusts, a savings that can be passed onto their donors. These reduced fees are due to The San Diego Foundation's relationship with U.S. Bank Charitable Services, which manages a portion of The Foundation's planned giving assets.

The San Diego Foundation is pleased to offer these partnership opportunities. We truly believe this support will help build sustainable nonprofits that will improve the quality of life within all of our communities.

For more information, please contact Amy Walling, Certified Specialist in Planned Giving and Senior Director of Planned Giving, Estate Administration, and Research with The San Diego Foundation. Contact Amy at Amy@sdfoundation.org or (619) 235-2300.

NONPROFIT ENDOWMENTS

21st Century Fund Alpha Project for the Homeless Endowment Fund Alzheimers Disease & Related Disorders Association Fund Anza-Borrego Foundation Fund Arthur Appleton Conservation Area Fund The Arc of San Diego Fund The Arc of San Diego/Friends of Handicapped Children Fund The ARTS Endowment Fund The Athenaeum Endowment Fund AVID Center Endowment Friends of Balboa Park Fund Barrio Logan College Institute Endowment Big Brothers Endowment Fund Bishop's School Endowment Fund Borrego Springs Performing Arts Center Boys & Girls Club of Carlsbad Endowment Fund Boys & Girls Club of National City Endowment Fund The Boys and Girls Clubs of San Dieguito Foundation Fund Boys & Girls Foundation Burn Institute Endowment Fund Cabrillo National Monument Fund California Society of the Sons of the American Revolution Fund Casa de Amparo Board Designated Endowment Fund Community Catalyst Endowment Fund Catholic Charities, Diocese of San Diego Fund The Center for Women's Studies and Services Endowment Fund Chinese Consolidated Benevolent Association of San Diego Incorporated Fund San Diego Christian Growth Ministries Citizens Coordinate for Century III Endowment Fund Committee of 100 Fund Community Christian Service Agency, Incorporated Fund Cuyamaca Rancho Foundation Endowment Fund Betsy Dam Fund for Arts Education Desert Protective Council Imperial County Endowment Fund Dinwiddie Preserve Fund Diversionary Theatre Fund Dr. William Kupiec Academy for Girls Endowment Fund Eagle Peak Preserve Endowment Fund	Eco-Life Foundation Director's Endowment Elementary Institute of Science Endowment Fund ElderHelp of San Diego Fund Emmaus Today Endowment Fund Engel Family Preserve Fund Epilepsy Society of San Diego County Endowment TECC Bumann Habitat Management Endowment Fund The Fallbrook Land Conservancy Preserve Fund Family Service Association of San Diego County Fund Fresh Start Surgical Gifts, Inc. Fund Friends of National City Library Fund Friends of the Chula Vista Library Fund The Friends of the Del Mar Library Fund Friends of the San Diego Public Library Endowment Fund Carilyn Gilbert Education Endowment The George G. Glenner Alzheimer's Family Center, Incorporated Fund Helen Woodward Animal Center Fund Hellers Bend Preserve Fund Hispanic Community Services Fund Home of Guiding Hands Fund InterAmerican College Fund La Jolla Civic/ University Orchestra & Chorus Association Fund La Jolla Elementary School Library Media Center Fund La Jolla Elementary School Music Fund La Jolla Golden Triangle Rotary Club Foundation Fund La Jolla Music Society Endowment La Jolla Music Society Fund La Mesa First United Methodist Foundation Fund La Maestra Family Clinic Endowment LAMBDA Archives of San Diego Fund Camp Fire USA/Larabee Fund Las Patronas Endowment Fund LEAD San Diego Fund San Diego LGBT Community Center Fund Little Italy Endowment Fund Los Jilgueros Preserve Fund	Mainly Mozart Festival Endowment Make-A-Wish Foundation of San Diego Endowment Fund Mama's Kitchen Endowment Fund Maritime Museum of San Diego Endowment Fund Metropolitan Community Church of San Diego Endowment Fund Mexican-American Educational Guidance Foundation Fund Monarch School Endowment Fund Monserate Mountain Fund MTACSD - Helen B. Goodlin Fund Museum Of Photographic Arts Fund The National City Rotary Club Foundation Fund National Multiple Sclerosis Society, San Diego Chapter Fund Nativity Prep Academy Endowment Fund New Americans Immigration Museum and Learning Center Endowment Fund The North Coast Repertory Theatre Endowment Fund North County Alano Club Forever Fund North County Interfaith Council Endowment Fund Oceanside High School Foundation Fund Oceanside Public Library Foundation Old Mission San Luis Rey Historic Foundation Olympic Training Center Fund TECC Onyx Ridge Endowment Fund Palomar Family Counseling Service Inc. Fund The Parent Institute/ Hess-Mardirosian Fund Parkinson's Disease Association of San Diego Pathfinders of San Diego, Inc. PAWSITIVE Teams Endowment Fund Pioneers Memorial Hospital Foundation Fund Poway Center for the Performing Arts General Endowment Fund Project Concern International Fund Michael Putnam Memorial Fund Quail Botanical Gardens Foundation Endowment Rachel's Women's Center Catholic Charities Fund Rancho Coastal Humane Society Witmer Animal Care Fund	Rancho Bernardo Joslyn Senior Center Fund Peggy Raymond Reading Endowment Rock Mountain Preserve Fund Rolling Readers Book Fund Rotary Club of San Diego Foundation Trust Fund Rotary Club of Coronado Foundation Fund Rotary Club of San Diego/ Thomas W. Sefton Endowment Fund Rotary Club of San Diego/Norm Foster/Camp Enterprise Fund Rotary Club of San Diego Designated Endowment Fund San Diego Air & Space Museum Fund San Diego Audubon Society Endowment Fund San Diego Center for Children Foundation Endowment Fund The San Diego Children's Choir Fund San Diego County Medical Society Auxiliary Fund San Diego Foundation for Change - Fund for Progressive Social Change San Diego Hall of Champions Endowment Fund San Diego Hospice Foundation Endowment Fund San Diego Junior Theatre Endowment Fund San Diego Endowment for the Preservation and Study of Mission Trails Regional Park San Diego Museum of Man Endowment Fund San Diego Opera Permanent Endowment Fund San Diego Public Library Endowment Fund San Diego Repertory Theatre Endowment Fund San Diego Society of Natural History Endowment Fund San Diego Service Center for the Blind Fund San Diego Symphony Orchestra Fund San Diego Yacht Club Library and History Archives Endowment Fund San Diego Youth Services Fund San Elijo Lagoon Conservancy Endowment San Marcos Historical Society General Endowment Fund San Diego Master Choral Endowment	San Diego Yacht Club Sailing Foundation Junior Program Endowment Fund Second Chance Fund Senior Community Centers of San Diego Endowment Fund Spreckels Organ Society Endowment Fund Sunshine Brooks Permanent Fund Tariq Khamis Foundation Fund TECC Quarry/ Rock Springs Condos Habitat Management Endowment Fund TECC Coler/ Meadowbrook Habitat Management Endowment Fund TECC Greenland Habitat Management Endowment Fund TECC Quarry/ EUSD1 Habitat Management Endowment Fund TECC San Elijo Ridge Habitat Endowment Fund The Back Country Land Trust Endowment Fund The Friends of the Chula Vista Nature Center Endowment Fund Tierra Miguel Agricultural Easement Fund Torrey Pines Reserve Endowment Fund Union of Pan Asian Communities Fund United Cerebral Palsy Endowment Fund United Service Organization Endowment Fund Ft. Rosecrans Memorial Fund Information & Referral Endowment Fund Edward Viel Murphy Legacy Fund Ben Polak Legacy Fund Volunteer Center Endowment Fund United Way Endowment Fund Urban Corps of San Diego Endowment Fund USS San Diego (CL-53) Memorial Fund San Diego Watercolor Society Eunice Porte Memorial Fund Wesley United Methodist Church Endowment Fund Westwind Brass Endowment Women's History Museum and Educational Center Endowment Fund Women's Resource Center Endowment Fund
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