

Amplified  
Giving.  
Momentum  
for Good.



# Your Partner in Giving

Welcome to the Orange County Community Foundation! Since 1989, OCCF has supported the philanthropic goals of individuals, families, business leaders, private foundations and professional advisors. Whether you seek to maximize current giving, develop a tradition of family philanthropy or ensure a lasting charitable legacy, we are your partner in strategic and sustainable giving.

This guide provides an overview of how OCCF can help you impact the causes closest to your heart. We offer an array of full-service funds, strategies and tools to realize your philanthropic goals – today and for generations to come. With deep insights into our community and local nonprofits, and knowledge to support your giving in Orange County, across the country or around the world, we make giving easy, effective and enduring.



**Shelley M. Hoss**  
President &  
Chief Executive Officer

A handwritten signature in brown ink that reads "Shelley M. Hoss".



Giving through an OCCF fund brings a wide range of benefits, flexibility, efficiency and accountability. There is no cost to establish a fund and with our thoughtful planning and diligent stewardship, you can maximize the impact of your charitable investments.

## We Help You

### Acquire Insight

- Explore charitable interests in Orange County and beyond
- Tour nonprofits in areas of interest
- Gain deep understanding of community needs

### Build Knowledge

- Attend exclusive educational events
- Explore our extensive data on hundreds of local nonprofits
- Connect with donors who share your interests

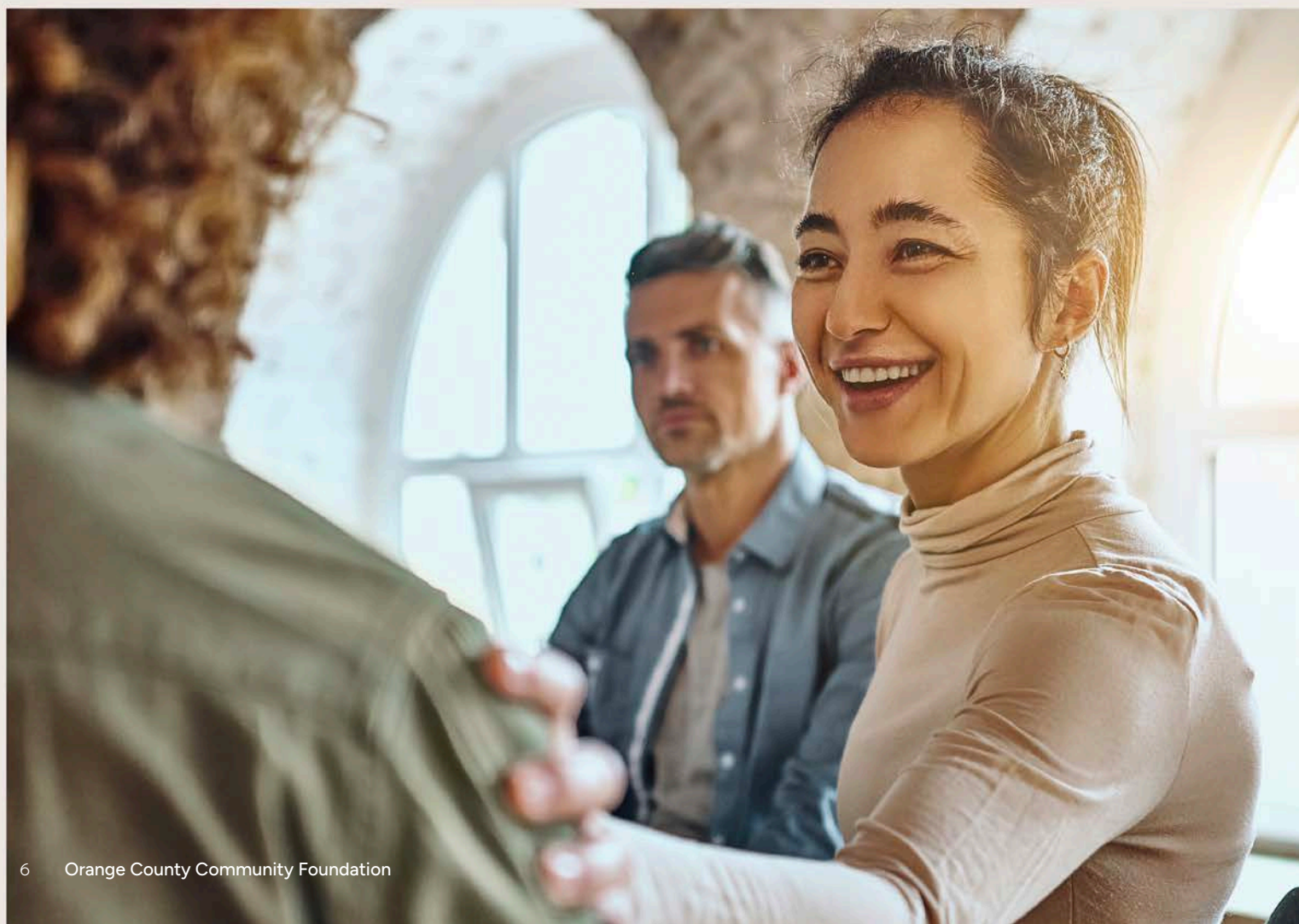
### Refine Vision

- Develop a strategic giving plan
- Engage your children or grandchildren in charitable giving



# Give with Impact

# Transforming our Community's Heartfelt Intention into Greater Impact for Good.



## Working with OCCF



### Tax Advantages

You receive an immediate tax deduction upon opening and contributing to your OCCF fund. We accept a wide range of assets to help you maximize the tax benefits of your charitable contribution.



### Knowledge & Insight

We understand the needs and issues facing communities within Orange County and beyond and help guide charitable investments for greatest impact.



### Flexibility

We accept marketable securities, closely-held stock, retirement funds, limited liability partnerships and LLC interests, private equity and commercial and residential real estate, among other assets.



### Simplicity & Ease

We offer the benefits of a private foundation without the legal complexities and administrative burdens.



### Accountability

Stay up to date on your fund balance and activity through our 24/7 online donor portal.



### Lasting Legacy

Funded through a bequest, legacy funds can support your philanthropic priorities forever. We steward your charitable vision during your lifetime and beyond.



### Savvy Investing

Diligent oversight from OCCF's Investment Committee and our independent investment consultant allows your fund to grow over time.

# How it Works

## Setting Up Your Fund

Choose from a wide range of charitable fund options and tailor them to fit your philanthropic goals. At OCCF, you can create and name a fund, serve as an advisor and recommend charitable grants. Each contribution made to your fund is tax deductible.\* OCCF handles the legal, financial and administrative duties, so you can focus on what matters most — making an impact in your community.

## Giving to Your Fund

OCCF has the flexibility and expertise to accept a wide range of assets so that even the most complex ones can fuel your philanthropy. We can help you consider the impact on your finances and assess the potential benefits for your estate in years to come.

**Cash.** Fully deductible, gifts of cash can offset up to 60 percent of your adjusted gross income (AGI). Unused deductions can be carried forward up to an additional five years.

**Appreciated Assets.** Long-term appreciated assets, such as publicly traded securities and mutual fund shares, provide an immediate tax deduction at full market value (without triggering capital gains taxes on the appreciation), offsetting income taxes of up to 30 percent of your AGI. Unused deductions can be carried forward up to an additional five years.

**Closely-Held Business Interests.** Gifts of LLC, LLP, S corporations or family limited partnership interests give you a tax deduction for the appraised fair market value, offsetting up to 30 percent of your AGI.

**Legacy and Estate Gifts.** Including OCCF in your estate plan with a properly structured gift can help mitigate estate tax liability, preserve your charitable intent and provide legacy support for your favorite causes.

**Retirement Plan Assets.** Contributing various forms of retirement plan assets can help reduce or eliminate income and estate taxes.

## Granting from Your Fund

Once you've contributed to your fund, you're ready to begin recommending grants to local, national or international organizations or efforts. OCCF staff will conduct due diligence and contact you with any questions. A grant check will then be issued from your fund, along with a letter detailing the gift and any reporting or acknowledgment requirements.

\*See your financial advisor for your specific tax planning needs.





# Giving Together

## Scott & Karen Green

Giving back had always been a part of Scott and Karen Green's lives, and after Scott sold his company in 2009, philanthropy could take center stage in their plans for the future. Establishing a fund at OCCF was the perfect option for their tax planning and philanthropic needs. OCCF worked closely with Scott and Karen to understand their goals and create a robust 10-year strategic giving plan – the centerpiece of which was engaging their three young children in philanthropy. After more than 10 years of giving together, the Green family is transforming their heart for those in need – especially those experiencing homelessness, mental health issues or domestic violence – into lasting impact not only in Orange County, but around the world.



## The Sun Family

In partnership with their company Kingston Technology, David and Diana Sun are unleashing the potential of deserving students through the gift of higher education. Their scholarship program supports students who have excelled in the AVID (Advancement via Individual Determination) program, which fuels academic achievement for thousands of diverse and underrepresented students through an innovative, inquiry-based approach.

## Sona Shah

From a young age, education and philanthropy have been important pillars in Sona's life. Through her Inspire Philanthropy Fund at OCCF, Sona's experience with our expert guidance and stewardship led her to launch the Inspired Teacher Grant Program which supports Orange County K-12 school teachers providing classroom project-based learning.



"It's been such a pleasure working with the incredible team at Orange County Community Foundation to turn this vision into reality."

- Sona Shah, Founder of Inspired Teacher Grant Program

# Your Dreams Brought to Life

The Center for Engaged Philanthropy provides personalized philanthropic services to support Signature Fund donors and private foundations. You will have direct access to our expert knowledge and understanding of the nonprofit sector in Orange County and beyond. We are here to bring your philanthropic dreams to life!

## Signature Funds

Our Signature Fund combines the best features of a private foundation, including the utmost privacy, flexibility, family involvement and expertise, with all the benefits of an OCCF fund. Fund with assets of \$1 million or more qualify as Signature Funds.

## Private Foundation Services

For individuals and families who already use a private foundation, the Center for Engaged Philanthropy can serve as a valuable partner in supporting and facilitating your family traditions of giving. We are uniquely equipped to reduce your administrative burden while helping you achieve maximum impact with your charitable dollars. And if you decide to wind down your foundation at some point, we are here to help with the process and ensure that your philanthropic impact doesn't miss a beat.



## Ways to Engage

We are always looking for great partners — which is why we offer numerous opportunities for you to join us and other charitably-minded individuals in lending your ideas, experience and engagement to make a lasting impact in our community.

The **Family Foundation Alliance** is a group of local family foundations committed to learning and sharing together to maximize their impact.

The **Impact Philanthropy** group allows individuals to participate in a collaborative grantmaking program with a focus determined by the group each year.

With our strategic community leadership initiatives, including **Accelerate Change Together (ACT) Anaheim**, the **OC Veteran's Initiative** and the **OC Opportunity Initiative**, you can collaborate with other philanthropists to make sustainable local change.

## Swayne Family Foundation

In 2018, Keith Swayne transitioned his family's private foundation into a fund at OCCF to ease administrative burden and support the eventual succession of his philanthropic work to his daughter. What began as an administrative decision has since paid even greater dividends in their family's approach to giving. Today, Keith and his daughter are actively expanding and accelerating their philanthropy. They're working with OCCF to find and evaluate new, mission-aligned nonprofit organizations and collaborating with other donors to leverage their funds for greater good.

**"A strong community foundation is not only a vehicle to execute the philanthropic interests of individuals in an effective and impactful manner, it's an invaluable tool for educating donors on the needs of the community and the organizations working to address them."**

—Keith Swayne



# The Legacy of a Lifetime

Established through an estate gift or bequest, a legacy fund ensures that your philanthropic vision lives on. With careful planning, you can structure your gifts to accomplish philanthropic, family and financial goals in the present and build a legacy that will grow for generations to come. It's a lasting way to give, share and grow.

## Malli & Rani Varanasi



Malli and Rani Varanasi are letting their dreams shape the future of their giving, counting on OCCF to steward their vision during their lifetimes and beyond. From reducing homelessness, to helping elders experiencing hunger and women struggling with poverty and abuse, their OCCF legacy fund allows the Varanasis to support what matters most to them, forever.





# Growing the Good



## Keeping the Music Alive Jane Deming Fund

In 1995, the estate of Jane Deming established an endowed fund at OCCF with **\$779,625**. The fund was designed to continue Jane's lifelong support of music, education and therapeutic services for troubled families and youth. Since then, the Jane Deming Fund has granted to programs including KidWorks, the Philharmonic Society of Orange County and the Pacific Symphony's Class Act music education program, which puts professional musicians in classrooms throughout Orange County. Today, the fund's balance exceeds **\$955,000**, reflecting net-growth of nearly 10 percent, even after more than **\$1.2 million** in grant distributions. We know this would be music to Jane Deming's ears.

OCCF strategically manages investments to maximize returns and minimize risk. A diversified portfolio of stocks, bonds, mutual funds and alternative investments, managed with expertise and vigilance, protects your philanthropic investments through the ups and downs of market cycles.

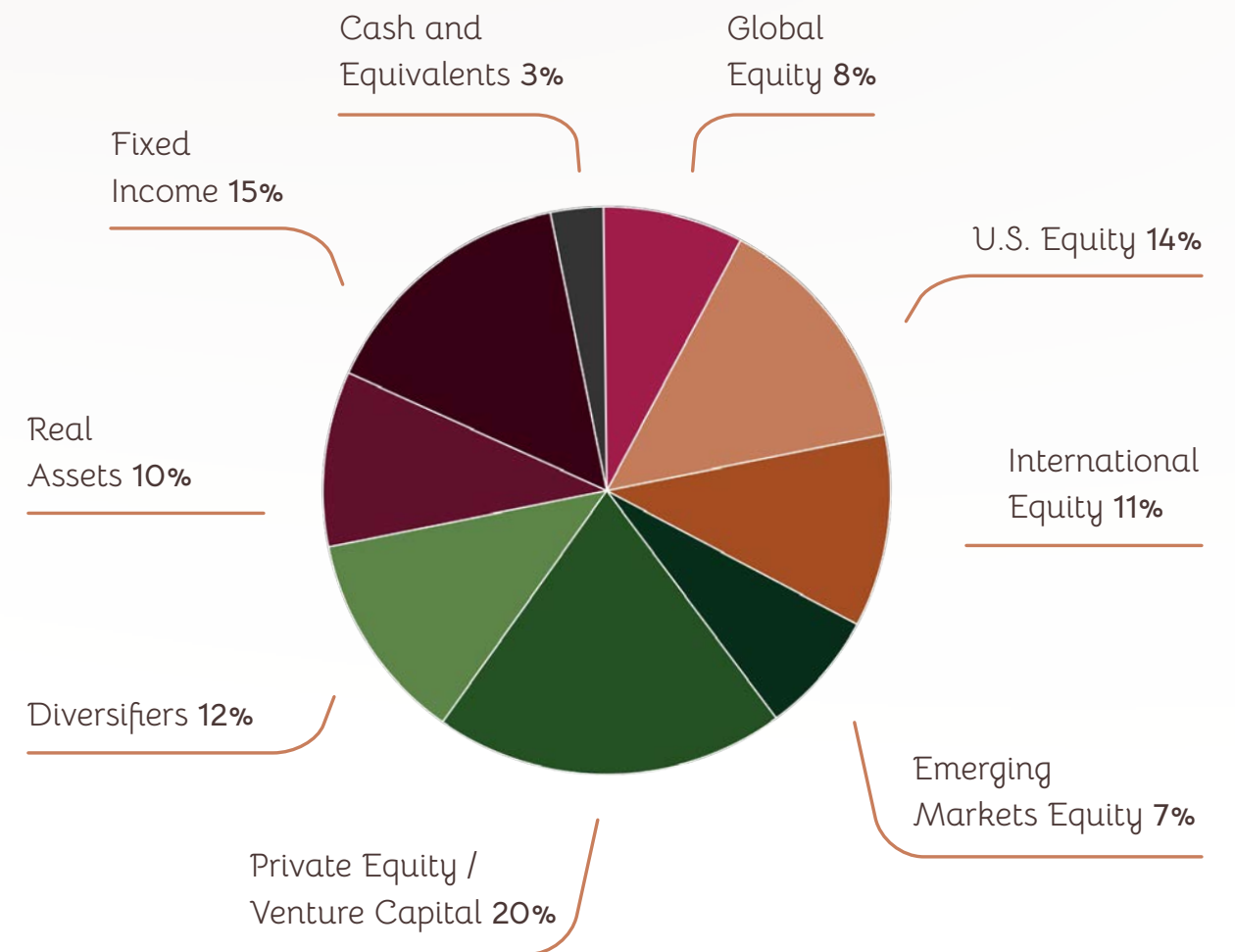
With responsibility for prudent management of investments, OCCF's Board of Governors establishes guidelines, approves asset allocation and reviews performance on a quarterly basis. The OCCF Investment Committee implements the board's strategy with the support of our independent investment advisor, **Cambridge Associates**, meeting quarterly to ensure proper alignment with our investment strategy and goals.

### Cambridge Associates

Cambridge Associates was founded in 1973 to provide independent investment advice to nonprofit institutions. Today, with more than \$8 billion in total assets under management, they are among the most highly-regarded advisors to foundations, educational institutions and charitable entities in the United States.



### Asset Allocation



The world is full of opportunities to give. Whether you seek to maximize current giving, develop a tradition of family philanthropy, or ensure a lasting charitable legacy, the Orange County Community Foundation (OCCF) is your partner in strategic and effective giving. Since 1989, OCCF has supported the philanthropic goals of

individuals, families, private foundations and professional advisors through an array of full-service funds, tools, and options which can be tailored to your needs. Working together we have awarded nearly \$975 million in grants and scholarships in Orange County across the country and around the world.

## Frequently Asked Questions

### Can I grant outside of Orange County? Outside of the United States?

Yes! While we have deep knowledge of local needs and nonprofits, OCCF helps donors support causes not only in Orange County, but across the country and around the world.

### What's the difference between an OCCF fund and a private family foundation?

An OCCF fund offers the benefits of a private foundation without the legal complexities, administrative burdens and compliance requirements. An OCCF fund allows you to create and name your fund, serve as its advisor and recommend charitable distributions. But unlike a private foundation, there is no cost to establish a fund and no required minimum payout.

### How much does it cost to open a fund? How do you assess fees?

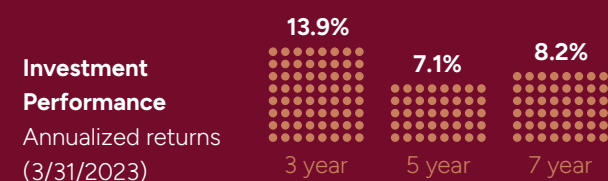
There is no cost to open a fund with OCCF. Administrative fees are assessed quarterly and cover general operating costs associated with management and granting activities of the fund. Investment management and consulting fees related to the foundation's investment pools are charged separately.

### What happens to my fund when I pass away or am no longer able to make decisions?

At OCCF, we work with you to plan and structure your gifts to grow for generations to come and ensure that your philanthropic vision lives on under the careful stewardship of OCCF's philanthropic advisors and Board. You create philanthropic legacy guidelines with our help, including assigning advisory rights to other family members or friends, designating specific organizations to receive annual support or identifying needs in the community you would like your fund to support.

## At a Glance

Home to more than **600** charitable funds benefiting a wide range of causes, including, **human services, education, health and wellness, environment, the arts, community development.**



**4-STAR RATING** by Charity Navigator

## The Numbers

**\$554 million**  
In **total assets**  
(12/31/2022)

**\$975 million**  
**Cumulative granting**  
since inception

**\$76 million**  
**Grants & Scholarships** Awarded in FY2022

Top **1%** in granting activity  
among **780** U.S. Community Foundations.

## Find your perfect nonprofit match

Orange County Community Foundation created Nonprofit Central, Orange County's first-ever, fully searchable online database of more than 500 local nonprofit organizations.

Learn more at [OCNonprofitCentral.org](https://OCNonprofitCentral.org)





 **Orange County  
Community Foundation**



19200 Von Karman Ave., Suite 700, Irvine, CA 92612  
949.553.4202 | [oc-cf.org](http://oc-cf.org) | [ocnonprofitcentral.org](http://ocnonprofitcentral.org)

     
[@OCCommunityFdn](https://www.instagram.com/OCCommunityFdn)