

Giving Beyond The Giving Day



Orange County Community Foundation
Giving Day Summit
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Meet the Speakers



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About Us



- F&M Bank founded in Long Beach in 1907 by C.J. Walker
- Currently run by the 4th generation of Walker family members
- 27 branches spread out across Orange, Los Angeles, & Santa Barbara counties



- F&M Trust Company founded in 1920
- Currently led by 4th and 5th generation Walker family member
- 5 offices (Long Beach, Laguna Hills, Torrance, Santa Barbara & Newport Beach)

Our Why

FOUNDING VALUES

We bank the way we live.

Honesty

we always tell the truth.

Integrity

the promises we make are ironclad.

The Home

our families come first.

The Church

our faith gives us strength in good times and bad.

Service Above Self

we put the needs of others ahead of our own.

Our commitment to community is rooted and reflected in our Traditions.



Non-Profit Sources of Revenue



Highlights



UNIQUE GIFTS



LEGACY GIVING

Unique Gifts: Krugerrand Coin Donation



What are Unique Gifts?



**MOST
COMMON:**

APPRECIATED STOCKS OR
MUTUAL FUND SHARES



**MOST
UNDERUTILIZED:**

BENEFICIARY
DESIGNATION FOR IRA



**MOST
LABORIOUS:**

APPRECIATED ASSETS &
REAL ESTATE



Questions to Ask When Considering a Unique Gift

- 1. Do you have a gift acceptance policy?**
 - ▶ Internally created and board approved
- 2. Can we accept the Gift?**
 - ▶ Consider the costs associated with appraisal, sale of gift, and transfer of funds
- 3. Are there gifts that you don't want to accept? When does a gift not make sense?**
 - ▶ When the cost of accepting the gift is more than the value and staff time
- 4. What can I do if our organization cannot accept the gift?**
 - ▶ Check with the Orange County Community Foundation!

Legacy Giving:
St. Thomas
Aquinas College



What Are Some Example of Legacy Giving?



Living Trust & Charitable Remainder Trust



Establishing a Foundation



Funding an Endowment

Benefits of A Legacy Gift

For the Donor

- ▶ Engagement with the nonprofit during their lifetime
- ▶ Tax advantages

For the Non-Profit

- ▶ Allow for long-term financial stability of the organization
- ▶ Allow donors to make larger contributions that may not be possible during lifetime
- ▶ Creates an avenue to receive and steward funds



How to have the conversation with donors

The background features a repeating pattern of question marks in various shades of green and grey, set against a backdrop of overlapping geometric shapes in shades of green, brown, and white. The text is centered in a dark green, sans-serif font.

What role should Nonprofit Boards play in Legacy Giving?



Q&A