

Your Partner in

Family Philanthropy



## Family Philanthropy Services

For families who engage OCCF as a partner, our experienced team offers personalized support to ensure that charitable giving is meaningful, impactful and rewarding. Whether giving is done personally or through a family foundation, OCCF donor-advised funds can accelerate charitable impact through:



Strategic giving planning to ensure vision, clarity and focus



Streamlined administration and documentation of annual giving



Research and reporting on targeted issues and specific organizations



Individual funds for children or grandchildren to start their giving journey

## Signature Fund Services

An OCCF Signature Fund combines the best features of a private foundation with the ease of a donor-advised fund, affording the utmost in privacy, flexibility, multi-generational family engagement and philanthropic expertise while enjoying the tax benefits associated with a public charity. Funds with assets of \$1M or more are eligible for expanded concierge services including:

- Personalized family philanthropy planning with hands-on engagement of multiple generations
- Development and administration of customized grant programs, including international granting
- Dedicated marketing and web support tailored to your family's visibility preferences

## Engage and Learn

We offer educational and networking opportunities for you to join us and other charitably minded individuals making an impact in Orange County, across the country or around the world.



### Family Foundation Alliance:

Local family foundations meet quarterly for engaging presentations and peer learning opportunities to bolster their knowledge and impact on the issues they care about most.

Orange County  
**Family Foundation Alliance**  
powered by the Orange County Community Foundation



### Collaborative Giving Days:

Our Giving Days use an online giving model to match local donors to OC nonprofits with shared missions – to create momentum on a single shared day and leverage combined outreach efforts.



### OC Nonprofit Central:

Orange County's only online resource with in-depth information on more than 600 local nonprofits. Find detailed financial and programmatic metrics, make informed charitable decisions, and give all in one place.



## Did You Know?

- Private foundations can use OCCF funds to help reduce administrative burdens
- OCCF can accept real estate, privately held business interests, cryptocurrency, and more
- A donor advised fund can help meet the 5% private foundation annual granting requirement
- OCCF fulfills charitable grants locally, nationally, and internationally
- We can faithfully uphold your charitable wishes beyond your lifetime

## ♡ Leave a Legacy

OCCF works closely with you, your family and your professional advisors to craft a legacy plan that will faithfully uphold your charitable wishes beyond your lifetime.

Funded through a trust or estate gift, Legacy Funds can support your philanthropic priorities in perpetuity, or for any timeframe you choose.

OCCF can accept complex gifts including residential and commercial real estate, privately held business interests, and retirement funds among others.

## Peter and Ginny Ueberroth

Ginny Ueberroth along with her husband Peter Ueberroth, U.S. Olympic Committee president and former commissioner of Major League Baseball—have planted the seeds of generosity and community caring by giving the gift of an endowed OCCF donor-advised fund for each of their eight grandchildren. “We feel that having a donor-advised fund for each child requires them to have to look at where and how they want to give. It’s not a huge amount that they have, but it’s something they take quite seriously. It’s a learning tool,” states Ginny.



## 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**

## Malli and 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.



## OUR MISSION

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

Contact us to get started!



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