

CHARITABLE ESTATE MANAGEMENT SERVICES

Many of our community members choose to leave money to charity in their will. Are there any causes you're passionate about?

Founded in 1951 to ensure that our community thrives today, tomorrow, and forever, the Community Foundation of the Holland/Zeeland Area (CFHZ) can help you achieve your charitable goals, during your lifetime and beyond.

Combining your overall financial and estate planning with charitable planned gifts can help you impact our community while minimizing your tax burden, providing for your family, honoring loved ones, preserving your family name, and reinforcing your personal values.

Our Charitable Estate Management services allow you to create a highly customized plan for the charitable portion of your estate to make things simple for your estate financial representative, and ensure your wishes are met beyond your lifetime.

How it works

- Choose your favorite 501(c)(3) nonprofits (local or national), how much you want each organization to receive (dollar amounts or percentages) and over what period of time you would like the dollars granted (lump sums, annual distributions or endowment). CFHZ takes care of distributing the gifts.
- If an organization you chose to support ceases to exist beyond your lifetime, CFHZ can follow your predetermined directions to apply the allocation elsewhere.
- During your lifetime you can change your plan at any time.
- You may choose to leave charitable dollars for your family to advise on.
- You may also choose to give anonymously.

You may choose to join the hundreds of others who have given a forever gift to the Holland/Zeeland area by including the Community's Endowment in part of your charitable estate plan.

Our Community's Endowment is comprised of Unrestricted Funds and Field of Interest Funds. These resources are pooled together to achieve greater impact both now and into the future. CFHZ uses a portion of these funds each year to invest in community change across a broad range of issue areas.

Unrestricted Funds: Unrestricted Funds allow you to leave a personal or family legacy in the community and know that the CFHZ Board of Trustees and staff will use the resources to respond to future needs and opportunities. Your gift will always be relevant, as resources are distributed to fit the most pressing needs and exciting opportunities in our community.

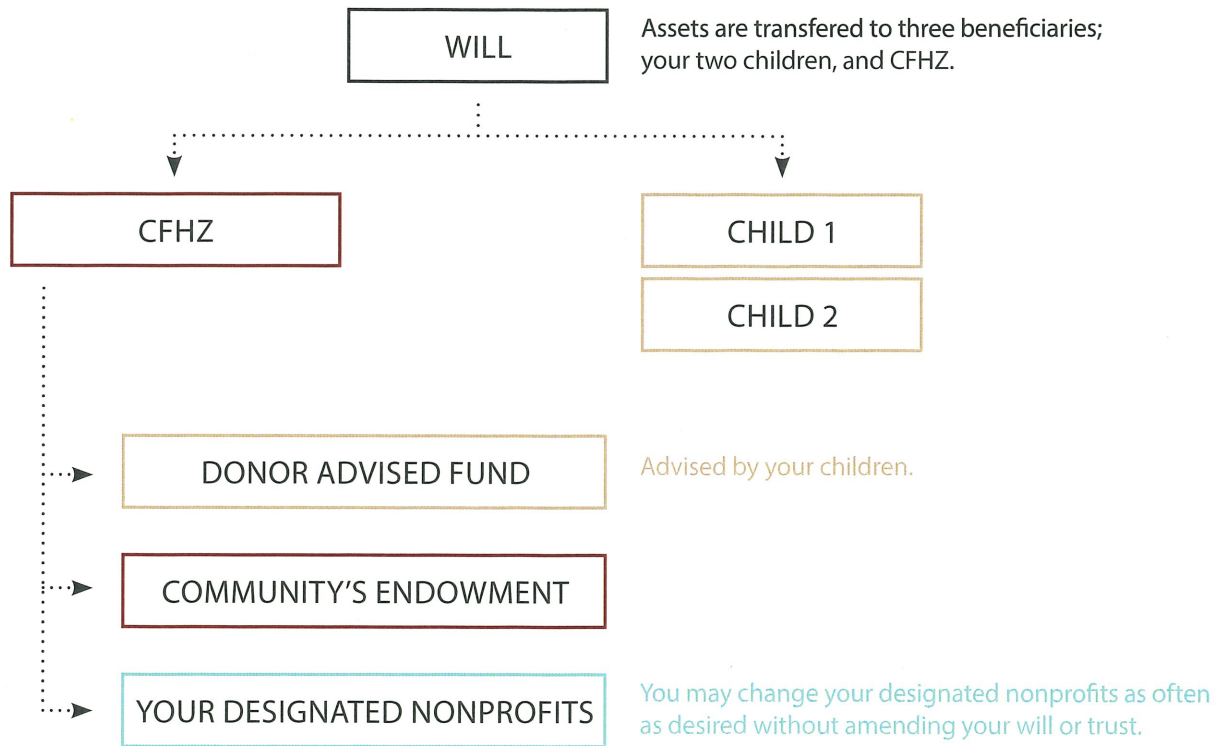
Field of Interest Funds: Field of Interest Funds allow you to identify the needs in the community you care about most (e.g. Youth, Basic Needs, Environment), while allowing CFHZ to identify the best possible community investments to meet those needs.



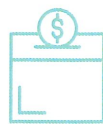
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CFHZ offers flexible options to make distributing the charitable portion of your estate simple for your personal representative and easy for nonprofit recipients, while allowing you to make significant charitable contributions to your favorite causes – perhaps larger than you could ever make during your lifetime.

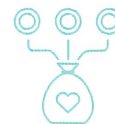
One Possible Scenario:



You choose your favorite nonprofits, including local, national, or religious organizations.



You specify how much you want each organization to receive.



CFHZ distributes the gifts either in a lump sum or in annual distributions over a period of years determined by you.

We know these decisions are deeply personal.

We're here to work alongside you, honoring your legacy and making a lasting impact on our community. To start a conversation about your charitable estate plans and learn more about how CFHZ may be a resource to you as it has been to hundreds of other community members, send us an email or give us a call.