



LIFETIME PHILANTHROPY

Family or Personal Foundation

For engaged philanthropists – individuals, couples and families – who want to create and activate a strategic, impactful giving plan over time.

FAMILY OR PERSONAL FOUNDATIONS CREATE GIVING PLANS THAT ARE PERSONALLY REWARDING, TARGETED AND MEASURABLE.

A Family or Personal Foundation at Seattle Foundation offers many of the desirable features of a private foundation with the simplicity and cost-effective structure of a donor advised fund. This option is a valuable way to engage around the shared values of generosity and community. The powerful combination of strategic guidance from our skilled Philanthropic Advisors, coupled with our deep local knowledge, enables your philanthropy to be a highly effective way to build ties among groups – whether partnering with other

philanthropists or working across generations within your own family – to make meaningful community impact. We also simplify your giving on the administrative side by managing the accounting and distribution of grants so you can focus on the joy of giving.

Philanthropists have great flexibility over grants made from a Family or Personal Foundation, how funds are invested and, if desired, the brand and visibility of the foundation in the community. In addition, assets contributed to a Family or Personal Foundation with us receive the more favorable tax treatment afforded to public charities.

**CONTACT US FOR A COMPLIMENTARY VISIT
WITH A PHILANTHROPIC ADVISOR: 206.515.2111
OR PS@SEATTLEFOUNDATION.ORG**



SEATTLE
FOUNDATION

the heart & science of philanthropy



Using our nationally recognized Giving with Impact™ curriculum, we work with you to identify your values and interests, evaluate your philanthropic budget and discuss ways to leverage your resources to achieve maximum impact.

FAMILY OR PERSONAL FOUNDATION BENEFITS

A Family or Personal Foundation provides a comprehensive structure and extensive support to help you accomplish your philanthropic goals in your lifetime and beyond.

SERVICES	KEY BENEFITS	FUND MINIMUM	COMMUNITY INVESTMENT FEE	ANNUAL MIN. FEE & SET-UP
Effective Philanthropic Advising	<ul style="list-style-type: none">• Dedicated senior Philanthropic Advisor• Advice and counsel to support customized gift planning and estate planning• Expert guidance on custom grantmaking process with detailed consulting reports• Support for Fund Advisory Board• Customized, multi-gen family or personal philanthropy sessions, including our nationally recognized Giving with Impact™ workshops• Family-focused events and learning opportunities• Access to a network of Community Foundations for national and multi-state issues• Access to professional networks, workshops and webinars via our membership in leading philanthropic organizations	\$500,000+	<ul style="list-style-type: none">\$0 - \$2m = 1.25%\$2m - \$4m = 1.00%\$4m - \$6m = 0.75%\$6m - \$10m = 0.50%\$10m - \$25m = 0.25%\$25m+ = 0.20%	<ul style="list-style-type: none">Minimum = \$2,500Set-up costs = \$0
Deep Community Insights	<ul style="list-style-type: none">• Curated site visits with nonprofits• Collective giving opportunities• Global giving options• Impact investments offering• Access to a range of proprietary philanthropic resources			
Judicious Stewardship of Assets	<ul style="list-style-type: none">• Experienced asset management with tailored investment options matched to giving objectives• Eligible for separate account asset management• Option for anonymity• Reliable, secure, convenient online access for fund administration and grant distribution• Gift acceptance of various asset types including: marketable securities; real estate; business interests; closely held, restricted or pre-IPO stock; cryptocurrency; life insurance; retirement assets			