

## Your Philanthropic Services Menu

Essential Elevate

We accept a **variety of gift types** including: cash, appreciated stock, real estate and business interests, life insurance, retirement assets, and charitable trusts.



We process your grants efficiently with timely distribution and **due diligence on every grant**.



**You're in control** with an online platform for making grant recommendations and checking fund balances quickly and easily, and choosing your gift recognition preferences: anonymous or named.



Learn about community needs with **access to information and funding opportunities** for nonprofits making a real difference in Sonoma County.



We help you **design the legacy you want to leave** with customized legacy and estate planning.



Your Donor Services Coordinator will provide you with **streamlined, excellent support**.



### Deepening your philanthropy with Elevate

*Available to donors with a minimum fund balance of \$250,000*

Elevate

A dedicated **Philanthropic Advisor** will be assigned to your fund. Your trusted partner in philanthropy will explore and support your philanthropic goals, mission, and values.



Our team offers **knowledge and customized research** on issues and organizations, including custom learning opportunities and site visits with nonprofits.



When you're ready to **dive deeper into making grants** on a specific issue, you'll have access to our staff, regional experts, and community leaders to help you deepen the knowledge base that guides your giving.



We work with you to develop and implement a **strategic giving plan** that is as unique as you are, ensuring your giving will be as thoughtful as it is impactful.



We work with you to introduce giving to all generations, engage current generations, **enrich philanthropy for your entire family**, and include a **successor advisor** for more than one generation.



We offer options for **international grantmaking**.



**For more information, please contact:**



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