

## Your Philanthropic Services Menu

Essential Elevate

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|--|---|---|
| We accept a <b>variety of gift types</b> 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 <b>due diligence on every grant</b> .  | ■ | ■ |
| <b>You're in control</b> 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 <b>access to information and funding opportunities</b> for nonprofits making a real difference in Sonoma County.  | ■ | ■ |
| We help you <b>design the legacy you want to leave</b> with customized legacy and estate planning.   | ■ | ■ |
| Your Donor Services Coordinator will provide you with <b>streamlined, excellent support</b> .  | ■ |   |

### Deepening your philanthropy with Elevate

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

Elevate

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|---|---|
| A dedicated <b>Philanthropic Advisor</b> will be assigned to your fund. Your trusted partner in philanthropy will explore and support your philanthropic goals, mission, and values.                                    | ■ |
| Our team offers <b>knowledge and customized research</b> on issues and organizations, including custom learning opportunities and site visits with nonprofits.  | ■ |
| When you're ready to <b>dive deeper into making grants</b> 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 <b>strategic giving plan</b> 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, <b>enrich philanthropy for your entire family</b> , and include a <b>successor advisor</b> for more than one generation.           | ■ |
| We offer options for <b>international grantmaking</b> .   | ■ |

**For more information, please contact:**



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