

**Community Foundation** for Northern Ireland

**Philanthropy Services**  
for **YOU** and your clients



**Community Foundation**  
NORTHERN IRELAND



# Adding **Philanthropy Services** to your portfolio

The Community Foundation for Northern Ireland is a local independent charitable trust connecting people who care with causes that matter.

A donor services and grantmaking organisation, we make a difference through thoughtful effective philanthropy. Our vision is for a vibrant, generous and socially just society.

## £20 million

A significant grantmaker in Northern Ireland, the Foundation has awarded over **£20m** in grants to **1,265 groups** in the last **5 years**



**connecting people who care**  
with causes that matter

“ Giving in Northern Ireland is deeply personal and often very private. In order to fully service clients’ interests – tapping into their values and engaging them in conversations about impactful giving is necessary.

That is why it is so important for professional advisors to be part of these conversations.”

Siofra Healy, *Director of Philanthropy*,  
Community Foundation for Northern Ireland

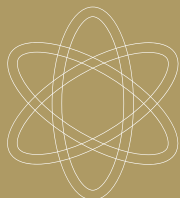
## Quality Accreditation and Governance

**Endorsed by the Charity Commission for Northern Ireland and Quality Accredited** we are a trusted secure means through which donors choose how, when and where to give.

The Community Foundation is a registered charity governed by a Board of Trustees.

“ My Financial Advisor introduced me to the Foundation which has been great for me. The team there make it all work.”

Mervyn McCall, Fund Holder





We are a  
**significant  
grantmaker**



## Community need in Northern Ireland

There is much to celebrate about life in Northern Ireland and as a Community Foundation we fund and support those who are making a difference where there are challenges; and we hear from across Northern Ireland the issues that people are facing within their communities.

We live in a community where there is significant poverty and inequality – a boy born in the most deprived areas of Northern Ireland could expect on average to live 7 years less than one born in the least deprived, there are 100,000 children living in poverty and more than half of our households spend 10% of their income keeping warm.

**44,703 people**  
work in NI's voluntary  
& community sector



Almost a third of charities  
have an income **below**  
**£5,000 per annum**



**45% of Charities**  
operate solely in their  
local council area



At the Foundation we use our unrestricted endowment to **get money to people who can't fundraise for themselves**. Most charities in Northern Ireland **don't employ fundraisers** or have the skills needed to generate income. We **prioritise organisations** who are connected to local communities **and we** convene and advocate for emerging issues in communities.

“I've been giving to good causes for a long time but it's time for a new challenge which is why I decided to set up a charitable fund. Northern Ireland has been good to me so I wanted to give something back.”

Alan Nappin – Chairman, ARN Foundation.



**connecting people  
who care** with  
causes that matter

# Matched funding and tax efficient



## Helping YOU to help others

There is growing interest to learn more about planned and effective giving and the options available in Northern Ireland. The Community Foundation is dedicated to providing you with trusted, independent and impartial advice, sharing resources and inspiring you to help your clients plan their philanthropy.

Whether you are a lawyer, accountant, financial advisor or wealth professional, we can help you add philanthropy services to your team and give the right advice to your private, corporate and charity clients about giving.

**With 40 years' experience as philanthropy advisors helping donors locally, we start with your clients' wishes and how they want to make a difference.**

### We can help you provide:

- A personalised, professional service that meets your clients' wishes and their means, whilst maximising benefit to the community;
- A range of giving options and opportunities to ensure your clients' giving is tax efficient;

- Best practice on giving to make an impact;
- Advice and knowledge of community needs and organisations that make a difference;
- A solution for individuals wishing to give confidentially;
- Transparency and accountability through our Board of Trustees and the Charity Commission;
- Distribution of residual client balances;
- Regeneration of moribund trusts;
- Supporting and facilitating philanthropy discussions.

### We facilitate discussion and provide advice, either directly to your clients or through you.

Good advice in this area is important. Your expertise combined with our experience can help you to meet your clients' charitable goals and exceed their expectations.

## How can your clients benefit from our Donor Services?

The Community Foundation is an ideal vehicle for your clients to provide structure to giving in a **Tax Efficient Way**. We are a flexible and trusted secure means through which your clients can choose how, when and where to give.

**The Foundation ensures charitable giving to the causes that your clients care about, is stress free and enjoyable, where clients can remain in control of their giving and get as involved in the process as they wish.**

If your client is looking to establish their giving for now, or for the future, or wishes to reduce the administrative burden of an existing trust, we can work with you to find the best solution.

- **We are impartial and independent** – as independent advisors we do not favour any one particular cause or issue.
- **More than double your clients' donations** – through our matched funding.
- **Giving locally** – your clients can support the local community in which they live and work.
- **Quick and efficient** – we can set up a named fund within 24 hours compared with waiting several months or longer to register as a charitable trust.
- **Flexibility** – no two donors are alike and our donor services offer options and flexibility to suit your clients' needs. From starting a bespoke charitable fund, to collective giving with others; from leaving a legacy to donating now, your clients benefit from our funding expertise, matched funding, community knowledge and giving advice. Our funds enable giving now and/or in the future.
- **We make giving easy and enjoyable** – we accept donations in cash, shares, land, property and other assets. Inviting and soliciting applications, carrying out due diligence, taking care of all monitoring, measuring and reporting – we support your clients to engage with the causes they care about.
- **We are knowledgeable** – with our expert knowledge of local community need we can match your clients' interests to specific projects, causes and initiatives.
- **Your clients decide which projects to support** – we encourage donors to have full involvement in decision-making; including which community projects to support and the level of funding.



“Without funding, there would be no project and if there’s no project, we’re not going to transform lives”



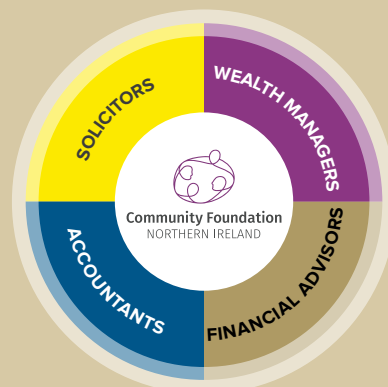
BENEFIT FROM TAX EFFICIENT GIVING AND MATCHED FUNDING

| Donation | Gift Aid | Foundation Match | Cost to Higher Tax Payer | Total Value of Donation |
|----------|----------|------------------|--------------------------|-------------------------|
| 10,000   | 2,500    | 10,000           | 7,500                    | 22,500                  |
| 20,000   | 5,000    | 20,000           | 15,000                   | 45,000                  |

- **We help clients give tax-effectively** – we are an ideal vehicle for all methods of tax-effective giving, including gift aid, relief from income tax, capital gains tax, inheritance tax and corporation tax.
- **We are permanent** – our endowment of £15m ensures we are here to stay, and the original intentions of your client are carried out without having to approach the Charity Commission for a variance of the original deeds of a trust or intentions in a will.
- **We are transparent** – we ask for a contribution towards our administration costs for managing a fund which varies depending on the size and type of fund, and we agree this, up front, with donors. We operate with a very low overall administrative overhead, which means that more money can go out in grants to the community.
- **We carry the financial and legal responsibility** – the onus on charitable trustees to invest and monitor funds, to ensure regulations are followed in grantmaking, to meet the stringent needs of accounting requirements and to report to the Charity Commission is increasing. When a fund is set up with the Community Foundation these responsibilities lie with our trustees.

- **Above all, we can offer you a personal and flexible philanthropy advice service, that will find a solution to meet and exceed your clients’ needs and expectations.**

Adding philanthropy services to your team



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# connecting people who care with causes that matter

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- Philanthropy services for you and your clients
- Alternative to private foundations without the responsibilities of governance
- Full client involvement in how funds are used
- Solution for individuals wishing to give confidentially
- Access to local organisations addressing issues your clients care about
- Distribution of residual client balances
- Regeneration of dormant or moribund trusts
- Guaranteed impact
- Assistance to distribute a legacy in accordance with client wishes
- Advice, Community Knowledge and Leadership



## GET IN TOUCH

**communityfoundationni.org**

 @CFNIreland

 @CommunityFoundationforNorthernIreland

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