

FUTURE FUNDS

Join us in building a better Bay Area.

A safe place to sleep, a child health program, career-ladder job training, wetlands protection in the San Francisco Bay—these programs, and many more, were made possible by donors whose generosity will live on forever in the vitality of the Bay Area. Whether you are thinking about legacy giving for the first time, or want to revisit your current plan, the San Francisco Foundation is a trusted partner to ensure your legacy carries out your vision for the future.

HOW IT WORKS

However you have decided to include the San Francisco Foundation in your estate plan, we can work with you to set up your future fund by completing a gift agreement. This agreement outlines your charitable wishes, and when your gift arrives in the Fund, we use the terms in the agreement to administer your gift.



BENEFITS

- You decide who or what to support. This may be to specific organizations or interest areas.
- Your fund can provide permanent support (endowed) or support for a limited number of years.
- Flexibility in keeping your charitable intentions current without also needing to revise your estate plan.
- If a specific organization closes, we can redirect grants to a similar organization and preserve your philanthropic legacy.
- Ability to give anonymously or name your fund in honor of your family or loved one.
- Opportunity to leave a legacy in your community.



San Francisco
Foundation

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TYPES OF FUTURE FUNDS

Endowed: Permanent and established to last in perpetuity, with the distribution of funds based on a annual spending policy amount as determined by the Board of Trustees of the Foundation. The minimum to establish is \$100,000. An administrative fee is charged annually.

Limited Duration: Established to last for a fixed term (usually 5 or 10 years), with the distribution of funds based on an agreed-upon schedule and formula. There is no minimum to establish. An administrative fee is charged annually.

Immediate Distribution: Established to provide immediate financial support. There is no minimum to establish. An administrative fee is charged upon receipt of the gift.

DISTRIBUTIONS FROM A FUTURE FUND

- Distributions can be designated to **specific nonprofits**. If a named organization ceases to exist, becomes obsolete, or is unable to perform its charitable purpose, the foundation will reallocate the funds in accordance with your instructions or original intent.
- Distributions can be designated to **fields of interest** such as the arts, environment, early childhood learning, etc. Geography can also be criteria. Organizations that work in those interest areas are selected by the expert program team at the foundation.
- Distributions can be designated for the foundation to address the most pressing current needs of the Bay Area.

SAMPLE DISTRIBUTION SCHEDULE

An endowed fund is established with a preference to support the following:

- 25% to support organizations or programs tackling homelessness
- 25% to support child or youth education and development
- 25% to support arts and culture organizations located Alameda County
- 25% unrestricted support to the San Francisco Foundation to address the most pressing current needs of the Bay Area