



THE JOY GIVING

A GUIDE TO
CHARITABLE
GIVING

OUR MISSION

STRENGTHENING THE INLAND EMPIRE THROUGH PHILANTHROPY.

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WHO WE ARE AND WHAT WE DO

IECF is here to help you, your family, or your business make a meaningful difference on the issues you care about through charitable giving.

Welcome to IECF's Giving Guide! We hope this booklet takes away some of the mystery of how you, your family, and your business can change lives in the Inland Empire and beyond through giving.

The Inland Empire needs your support. Very few dollars from large foundations make it to our region. That means our donors and their families are on the frontline for ensuring children and families have the resources they need to live better lives through education, healthcare, civic engagement, housing, and more.

In the desert, mountains, and valleys, nonprofit groups wake up every day to make a better Inland Empire, and they need your help. IECF can make sure these groups can care for their communities for the long haul.

We are driven by a desire to cultivate and build a culture of philanthropy in the IE, which means energizing and activating those who have committed to keeping their philanthropy local. We are proud of our record of giving over \$150 million in grants and scholarships over the last 80 years. With our nonprofit community, we understand the issues affecting our neighbors and can help you make the impact you desire.

IECF makes philanthropy easy with many tools and ways to help you find your giving voice and turn your passion into real change.

Please read through these pages to be inspired by IECF's donors and nonprofit partners, and contact us by phone or email. Our staff is ready to help you think about the issues and places that matter to you and how your giving will make a difference.

WHY TO GIVE WITH **iecf**

Donors choose the Inland Empire Community Foundation as their partner in philanthropy.

1. Community Leader with Deep Roots

With more than 80 years of philanthropic leadership in the Inland Empire, we understand the region's diverse challenges and the nonprofit organizations working to address them.

2. Trusted Leadership

Our Board of Directors is comprised of community leaders with diverse backgrounds and professional skills who provide thoughtful, strategic oversight of IECF's assets. Combined with staff expertise and personalized service to donors, IECF works to maximize impact throughout the region.

3. Nationally Accredited

IECF is the only nationally accredited foundation in Inland Southern California. This means we meet The National Standards for U.S. Community Foundations® and are committed to going above and beyond federal and state law requirements to demonstrate accountability and excellence to communities, policy-makers, and the public. Learn more at cfstandards.org.

4. Professional Management

IECF is an investment of your charitable dollars. Our diverse portfolios are managed by a Board committee of professionals with guidance provided by a nationally recognized consulting firm.

5. Giving Grows Here

We invest your gifts to grow and maximize the resources available to address community needs. For endowed funds, our investment goals are to preserve the original value of gifts, grow the assets in order to benefit the community forever, and help ensure a lasting legacy.

6. Flexible Giving

IECF offers a unique giving experience, tailored to suit your situation and goals. We accept a wide variety of assets, provide tax advantages, and can work with your professional advisor to better understand your charitable investment opportunities. Team up with IECF to maximize giving to the community!

BUILDING A LASTING LEGACY

What if your gift could improve lives and communities not just in your lifetime, but forever? That is the power of endowment funds. When you make an endowed gift it becomes a part of IECF's permanent endowment – meaning your gift will benefit our region forever and ensure that your legacy and love of community lives on. With IECF, you can create a fund to support the causes that you are most passionate about.

THE POWER OF ENDOWMENT

One of IECF's main goals is to inspire philanthropy and establish permanent charitable assets to strengthen local communities through grants to nonprofit organizations and/or scholarships. Although the needs of our Inland Empire communities will change, the urgency of addressing those needs remains constant. An endowed fund provides a permanent resource that can adapt to changing circumstances while honoring the wishes of those who had the foresight to build charitable capital for future needs.

An endowed gift is made and invested for long-term growth. A percentage of the fund's value is available to grant to charitable interests each year while the principal remains intact and is invested to grow over time.

For more information, contact the Charitable Giving Team at giving@iegives.org or 951-241-7777



In 1979, Leon S. Heseman, a retired assistant treasurer and lifelong Riverside resident, left an endowed gift of \$1.3 million to the Foundation to provide scholarships for students attending 4-year institutions. Since then, the Leon S. Heseman Fund has dispersed \$3.3 million in scholarships, benefiting students pursuing their educational dreams.

GRACE, ELEGANCE, GENEROSITY. MEET PEGGY FOUKE WORTZ.

Peggy Fouke Wortz was an extraordinary woman who transformed a life of privilege into a legacy of generosity.

IECF is proud that Peggy was a major benefactor. Her endowment in 2004 of more than \$4 million has benefited our region for almost 20 years and counting. She passed away February 18, 2008, but established a legacy of philanthropy that will be forever enriched by her commitment and example.

The granddaughter of Oldsmobile founder R.E. Olds, a world-renowned inventor and business leader, Peggy followed her family's lead in giving back to a region. Children, seniors, broken families, displaced pets, educators, the arts, and the environment were among the issues she supported. Some of her signature gifts



provided start-up funds to fledgling charitable agencies or challenge grants to organizations that needed a stimulus for a special project. Peggy

was also committed to the universities and colleges in the region, as well as The Living Desert Zoo and Gardens in the Coachella Valley. Most of all, Peggy loved people, and her warm smile and infectious spirit inspired all who had the privilege of knowing her.

The Peggy Fouke Wortz Memorial Community Impact Fund at IECF was established as a lasting memory and reminder that one extraordinary human being can make a huge difference in our society.

WAYS TO GIVE

When considering investing your money, you want choices. IECF makes supporting your favorite causes easy and effective, offering a variety of immediate, annual, and legacy giving options.

We also help you determine which of the more than 10,000 nonprofit organizations serving the needs of Riverside and San Bernardino counties align with your priorities, whether you want to provide educational scholarships or support health and human services, resources for children and families, environmental conservation and preservation, arts and culture, or any of the other cause that interests you. We tailor your giving experience to suit your preferences and goals.

Here's an overview of ways to give through IECF.

ESTABLISH YOUR OWN FUND

ENDOWED FUNDS: Establish any type of fund (listed below) as an endowment that generates grants or scholarships in perpetuity through stock and bond investments. Direct where monies go or rely on IECF expertise to identify areas of greatest need. Endowment funds are invested in a diverse portfolio of stocks and bonds to generate earnings that will help to continue your good work forever.

DONOR ADVISED FUNDS: You or your heirs direct the use of funds, and IECF handles IRS reporting and tracking of receipts. These funds make an immediate impact and support causes over time.

FIELD OF INTEREST FUNDS: Support multiple nonprofits focused on an issue, awarding support through a competitive grant application process or a designated fund restricted to a specific organization through yearly grants.

SCHOLARSHIP FUNDS: Invest in the community's future through strategic, needs-based scholarships for students who struggle financially or academically to achieve a higher education degree. IECF prioritizes investments in equitable educational attainment to support the region's innovation, development, and prosperity. Our staff works with you to design a program ensuring your contributions are fully tax deductible and scholarship awards are not treated as taxable income to the recipients. Award payments are made directly to the educational institutions on behalf of the recipients.

GEOGRAPHIC AFFILIATE FUNDS: These funds allow groups of donors in specific communities to create permanent funds to support their local needs. Under IECF's stewardship, the funds are governed by people in that community for the benefit of the area and its people.



CONTRIBUTE TO AN EXISTING FUND

If you want to help your community without having to conduct extensive and constant research into nonprofit organizations, you can contribute to one of these existing funds:

HERE FOR GOOD TODAY FUND provides annual support and community leadership on multiple issues, including advancing innovation and nonprofit capacity-building through regional fundraising and advocacy.

HERE FOR GOOD FOREVER FUND supports IECF operations, ensuring a strong community foundation in perpetuity.

COMMUNITY IMPACT FUND empowers IECF's board of directors to respond to the region's most critical needs as they arise – and through the lens of racial, gender, and economic equity. This ensures that our grantmaking builds the voice and power of our grantees to transform their communities. It also means listening to and incorporating the lived experiences of people who struggle daily to achieve safety, health, and prosperity in the Inland Empire.

Refer to website / Donate here link

<https://inlandempire.fcsuite.com/erp/donate/list?showlist=1>



WHAT TO GIVE

Gifts to IECF can take many forms. We accept a wide array of assets as contributions to a fund. You can use the following assets to make a gift:

CASH

STOCKS AND BONDS

REAL ESTATE

INSURANCE

RETIREMENT ASSETS

IECF is also happy to explore donations of other complex gifts as well.

Contact us for more information:

BRIE GRISET SMITH Senior Vice President of Charitable Giving, Riverside, 951-241-7777

JOSE MARQUEZ Director of Planned Giving, Riverside, 951-241-7777

JOHN MCGUIRK Regional Charitable Officer Coachella Valley, 760-836-2400

DARCY McNABOE Regional Charitable Officer San Bernardino, 909-453-2400

PLANNED GIVING

You can make plans now to give later. There are many ways to meet your planned giving goals, including through a bequest in a will or trust, retirement plan or life insurance beneficiary designation, charitable gift annuity, or charitable remainder trust. Even modest amounts can yield significant impact over time.

BEQUEST With the help of an advisor, you can include language in your will or trust specifying a gift be made to IECF as part of your estate plan. Your gift can be directed to an existing fund at IECF or to an endowed fund that you establish (see page 6). A bequest is one of the easiest gifts you can make.

CHARITABLE GIFT ANNUITY Transfer your cash or appreciated property to IECF in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life. You will receive a current-year charitable deduction for the remainder portion of your gift.

CHARITABLE UNITRUST OR ANNUITY TRUST / INCOME FOR LIFE OR A TERM OF YEARS
Transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax free and provides you with income (annuity provides fixed income) for life or a term of years. You will receive a current-year charitable income tax deduction for the remainder portion of your gift to IECF.

LIFE INSURANCE OR RETIREMENT ASSETS Name IECF as the owner and beneficiary of your new or existing life insurance policy and receive a charitable income-tax deduction. You may also name IECF as a beneficiary of your existing life insurance policy and receive an estate tax charitable deduction upon death.



AARON NORRIS: HIS LEGACY GIVES CHILDREN A PLATFORM FOR EXPRESSION

Businessman, philanthropist, and performing arts enthusiast Aaron Norris lived his life at full throttle. “It never dawned on him that one thing was enough,” recalls his father, Bruce Norris. “I don’t think he ever quit thinking about what’s next.”

Aaron succumbed to cancer in July 2022, but during his illness, he partnered with IECF to create the Aaron Norris Creative Fund to support arts programs in the Inland Empire. “Aaron was always interested in helping people find a path,” his father says. “The Aaron Norris Creative Fund will give a child a chance to do that.”

IECF fondly remembers Aaron for the leadership and dedication he provided the Give Big Riverside campaign, which raised more than \$1 million for local charities.

OUR FUNDS AT A GLANCE

CHOOSE A FUND AND MAKE YOUR IMPACT!

FUND TYPE	DONORS	PURPOSE	GRANTMAKING
HERE FOR GOOD FUND	Individuals, families, businesses	Ensure IECF can continue to serve and strengthen Inland Southern California	N/A
COMMUNITY IMPACT FUND	Individuals, families	Allows us the flexibility to respond to the most critical needs in the community	Professional staff and Board of Directors select grantees addressing the most pressing community needs
FIELD OF INTEREST	Individuals, families	Allows donors to direct their gifts to a charitable area of interest without the “hands-on” involvement of a donor-advised fund	Board of Directors approve the grants awarded to nonprofit organizations through a competitive grant application process
ADVISED	Individuals, families	Designed for donors to be actively involved in directing how funds are used	Donor and/or designated advisers select grantees
DESIGNATED	Individuals, families	Donors specify in their agreement which organizations will receive the available grants each year from their endowed fund	Donor designates specific organizations at outset that receive scheduled distributions. Designations are permanent
SCHOLARSHIP	Individuals, families, nonprofits, businesses	Together we design a scholarship program ensuring the donors’ contributions are fully tax deductible and scholarship awards are not treated as taxable income to the recipients	Donor and/or designated committee select scholarship recipients based on student application pool
LEGACY	Individuals, families	Allows donors to create a legacy beyond their lifetime	Donor plans to establish a fund to receive a future estate gift – Existing Fund, Operating Endowment, Advised, Designated, Field of Interest, or Scholarship. No assets are required to set up the fund for testamentary purposes

MEET OUR DONORS

PHOTOGRAPHY BY ALBERT ANGELO

Our donors are as diverse as the causes they care about. Meet a few donors who are already making a difference in our communities.



JACK FITZSIMMONS AND WALTER GENDELL

Jack Fitzsimmons and Walter Gendell have long championed causes and organizations they believe and sought a disciplined approach to giving.

Acting on advice from their financial advisor, the Palm Springs couple established a donor advised fund with IECF. They determined that many funds that IECF align with their areas of interest, including the arts, environmental issues, and a special commitment to organizations that serve the gay community.

They expect their pattern of giving to naturally evolve as their understanding of the foundation's mission deepens and their IECF-facilitated connections continue to grow.

"We're embarking on a new journey," Walter says, "and we've chosen IECF to help us think through the strategy. They're the right organization with the right people to move us in the direction we're interested in going."

RANDALL LEWIS

Randall Lewis, a Claremont resident who fulfills a family legacy of creating fair housing in California, feels "strongly connected" to at least 15 cities in which The Lewis Group of Companies has developed real estate.

"I've always cared about helping people and inclusivity, but [IECF CEO] Michelle Decker opened my eyes to collective impact – working together to make a real difference," Randall says.

Randall donated \$80,000 to IECF's Here for Good Fund, which supports the foundation's annual operations. "It is a way to say, 'I support the direction you're going,'" he explains. "In our region of over 4 million people, we've got a lot of talent. How do we unleash that talent and give people opportunities to think more entrepreneurially?"

Randall raises questions as challenges to be met with inclusivity. He not only wants others in economic positions such as his to say, "This is my community and I want to give back," but for the greater Inland Empire population to be able to say, "This is my community."



THE WEBB FAMILY

Kyle Webb invokes an African proverb: "If you want to go fast, go alone. If you want to go far, go together." This idea underpins Webb Family Enterprises' partnership with IECF to create the Webb Family Fund for Parity.

The Webbs – Reggie and René and their children, Karim, Kiana, and Kyle – have been active philanthropically and as community leaders, tracing to Reggie's chairmanship of the National Black McDonald's Operators Association, which negotiated a parity agreement to align the



percentage of African American-owned franchises with the percentage of African Americans in the U.S. population. The Webbs believe a similar approach can apply to the Inland Empire, where they live and have operated 16 McDonald's restaurants.

"We felt that we had to organize the leadership of the African American community around unity and parity and drive the community to improve," Reggie says.

As Kyle puts it, the family is passionate about "transforming quality-of-life outcomes. We want to strengthen our ties in the community in an authentic way by putting our resources to work here."

René adds, "We have to share our blessings. When you share your wealth, it grows."

JOIN US!

Make your philanthropy more strategic and meaningful. At IECF, we encourage your philanthropic efforts to be more than just writing a check. We want to show you what your giving can do by introducing you to nonprofit organizations and causes that meet your charitable goals and interests.

Contact us for more information on establishing your legacy at IECF.

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Stay Connected!

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