



Hertfordshire  
Community  
Foundation

# Philanthropy Planning Services

for Professional Advisors

## Making local giving easy

Hertfordshire Community Foundation is an independent charity which encourages local philanthropy. We provide advice and giving options for donors which we transform into funding and support for small charities, voluntary groups and individuals in Hertfordshire.

We also partner with professional advisors to provide expert advice to meet their clients' charitable giving objectives whilst ensuring their clients' giving delivers real impact.

Hertfordshire is typically perceived to be an affluent county. However, pockets of deprivation exist across the county and there is a real need to invest in key areas including our ageing population, young people, disability, housing and health and well-being.

HCF was established to help address these and other emerging needs. Through our research and understanding of the county we enable donors to give in a way that delivers real impact to the causes they care about.

“The knowledge and expertise of Hertfordshire Community Foundation has been invaluable in setting up and running our family fund”

Elliston Family



# Helping you to exceed your clients' expectations

HCF offers a personalised, professional service that meets your clients' wishes and their means, whilst maximising benefit to the communities of Hertfordshire.

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

## By working with HCF you and your clients will benefit in a number of ways:



### Local:

Our extensive local knowledge of community needs and organisations that make a difference. If your clients wish to they can visit projects to see the impact of their giving.



### Giving made easy:

Using our expertise we can match your clients' interests to projects, causes and initiatives. We carry out due diligence, undertake monitoring and reporting.



### Impartial:

As independent advisors we do not favour any one particular cause or issue.



### Permanent:

Our permanent endowment model ensures we are here to stay and the original intentions of your client will be fulfilled in perpetuity.



### Flexible:

Our services are tailored to meet your clients' needs. From starting a named charitable fund to leaving a legacy, your clients benefit from our expertise.





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HCF makes charitable giving to local causes stress free, easy and enjoyable, whether the amounts they set aside are large or relatively small.

## We offer a range of giving options and opportunities:

### Leaving a legacy or gift in their will:

Naming HCF as a beneficiary in a will provides your clients with the flexibility to support a wide variety of important local causes.

### Setting up a personal fund:

A personal, named fund is bespoke to your clients' charitable objectives. We handle the investment, compliance and governance. Your clients can choose the causes they wish to support and their level of involvement in the grant making.

### Setting up an 'in memory' fund:

A named fund can be established where funds are raised to remember a loved one.

### Collective giving with others:

Families, friends or business partners may wish to pool funds to setup a named fund together to achieve joint charitable objectives.

### A solution for individuals wishing to give confidentially:

We can ensure that your clients' charitable giving is kept anonymous should they wish.

## Named fund vs own charity/charitable trust:

Named funds are a great way to get directly involved in community philanthropy, without the cost and administration of setting up your own charitable trust.

	Setting up a charitable trust	Establishing a fund through HCF
<b>Set-up procedures</b>	Must register with the Charity Commission. Must appoint a Board of Trustees.	Simple fund agreement.
<b>Cost</b>	In the region of £1,000.	No set up. Annual management fee of 2% of fund value.
<b>Time scales</b>	May take weeks or months.	Can be set up within days.
<b>Investment, audit, tax and accounting</b>	Must fulfil financial and admin requirements and may incur professional fees.	HCF handles all associated financial reporting and administration.
<b>Reporting to authorities</b>	Must maintain financial records, prepare accounts and report to the Charity Commission.	HCF takes care of all reporting.
<b>Grant making process</b>	Donor is responsible for all aspects of grant making.	HCF identifies and assesses grants, provides input on community need, ensures follow up with recipients and reports back to donor.

## We can also assist with:

- **Trust transfers:**

HCF provides a range of solutions from assisting with grant making to taking over a trust completely.

- **Residual client balances:**

HCF's experience and expertise enables firms to utilise residual client balances to donate to local charities and achieve real impact across a range of themes and good causes. The funds are held in a general endowment earmarked for your firm rather than remaining inactive and subject to audit every year. Funds can be repaid should your client ask for their monies to be returned.



## Contact

If you would like to find out more about how HCF can support you incorporate philanthropy planning into your client offering or you have any questions, we would be delighted to hear from you.

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## Hertfordshire Community Foundation

Funding Local Causes

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