Philanthropy services
for you and your clients

Dorset Community Foundation

Add philanthropy services to your team

The best advice is given to clients by the best professional teams. A community foundation's specialist knowledge of the charitable sector in their local area can make them a key member of the best team a client can have.

Dorset Community Foundation (DCF) can enhance your services to clients. We can share ideas and examples of philanthropy that showcase a more proactive approach to charitable giving – helping your clients consider how and when they might best give their money.

Hear more from some of our clients who are happy to tell their story...

The big heart

Jean Edwards was the Chair of a family foundation and a former Chair of the Association of Charitable Foundations.

Through her fund Jean is able to give to a selection of grassroots local charities.

How we can help you with clients like Jean:

- An alternative to a private foundation without the responsibilities of governance
- Full client involvement over how the funds are used
- A solution for individuals wishing to give confidentially

"My fund enables me to support a variety of hand-picked local causes, making giving a very personal and rewarding experience."

Jean Edwards MBE

> Working with DCF is an effective way to give to the causes I care about - projects which support disadvantaged young people, saving me the complexities of setting up my own charity.
>
> Sara Jacson MBE

Sara Jacson MBE

The campaigner

Sara Jacson has a long standing commitment to support local young people. When she received an inheritance from her aunt and uncle almost 12 years ago she decided to set up her own charitable fund in their memory.

How we can help you with clients like Sara:

- A hassle-free and cost-effective alternative for anyone considering setting up a new charity
- All administration and governance taken care of
- Access to local organisations addressing issues they are most concerned about

The responsible business

Engineering company Superior wanted to make a strategic approach to its community engagement. By working in partnership with DCF the local company is creating opportunities for young people from disadvantaged backgrounds to study STEM (science, technology, engineering and math) education.

How we can help you with businesses like Superior:

- The chance to proactively plan their giving within their long-term financial budget
- A truly meaningful Corporate Social Responsibility programme that resonates with the business' activity
- Public recognition or complete discretion, depending on the wishes of the business

> Working in partnership with DCF gives us the confidence we need that our bursary fund is making a real difference.
>
> Mark Wallis, Commercial Director at Superior

The lasting tribute

The daughters of Joy and Lance Collier set up a fund in memory of their parents who had requested that a percentage of their residual estate should go to charity. Joy and Lance supported over 30 charities in their lifetime, so Bridie, Anne and Janet found it challenging to decide which charities to choose.

How we can help clients like Bridie, Janet and Anne:

- Support causes close to someone's heart now and in future generations
- Executors involved in decision making and distribution of funds
- Local knowledge and grant-making expertise for maximum impact

"Setting up a fund was straight-forward and hassle free. DCF's local knowledge and grant-making expertise enables our mum and dad's legacy to support areas and issues that were dear to them – such a wonderful way to remember our parents."

Daughters Bridie, Janet and Anne

Dorset Charitable Trusts

Due to financial instability in the last decade the trust management committee had a cautious approach to grant-making and as a result there was an underspend. DCF's local knowledge and grant-making expertise ensures the funding is now reaching targeted beneficiaries, fulfilling the trust's original objectives.

Colin Brady

"By transferring funds to DCF we were able to ensure a targeted approach to supporting those experiencing greatest deprivation."

Colin Brady, Social Justice Programme Manager at the Diocese of Salisbury

How we can help with established trusts:

- A home for funds within an established infrastructure endorsed by the Charity Commission
- Regeneration for dormant or moribund trusts, taking over administration and finding new projects
- Good accountability for trustees and assistance with long-term succession planning

> I have chosen to leave a legacy to DCF in my Will because I trust DCF to carry out my wishes to support disabled sports in Dorset long after I'm gone. The charities I support now may no longer exist in the future but Dorset Community Foundation will always be a living charity.
>
> Mark Woodhouse, Chairman
> Hall & Woodhouse

The legacy

Our Ambassador Mark Woodhouse has always been community minded and his family business — Hall & Woodhouse has supported hundreds of local charities through the Community Chest Fund.

Mark Woodhouse

How we can help with clients like Mark:

- An alternative for individuals hesitant to commit to specific charities in their Will
- Guaranteed impact, regardless of changes to the social or charitable landscape
- Assistance for an executor or solicitor to distribute a legacy in accordance with client's wishes

The trusted adviser

Liz Brierley is a Partner at Saffery Champness — an established accountancy firm advising some of the wealthiest UK individuals. She helps clients make effective financial planning decisions.

Liz Brierley

> The philanthropy planning services DCF offers complement my firm's own services. It makes such a difference having access to philanthropy expertise — DCF makes the whole process hassle-free and human for my clients.
>
> Liz Brierley, Partner at Saffery Champness

How we help you:

- Direct contact with you if you are acting on behalf of a client
- Integration of philanthropy services into your own client offering
- Introductions to others we have helped — sharing learning and ideas

Residual client balances

Professional firms are required to return balances on client accounts as soon as there is no longer a proper reason to retain them. DCF can transform unclaimed balances into an asset for the community.

How we can help you:

- DCF can hold funds in a general endowment earmarked for your firm rather than remaining inactive and subject to audit every year
- DCF will sign an indemnity and repay the funds should your client contact you and ask that the monies should be returned
- DCF'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

Social Investment Tax Relief

Social Investment Tax Relief (SITR) is designed to support charities and social enterprises in accessing certain debt and equity finance from individual investors, by offering 30% income tax relief.

How we can help you advise your clients on STIR:

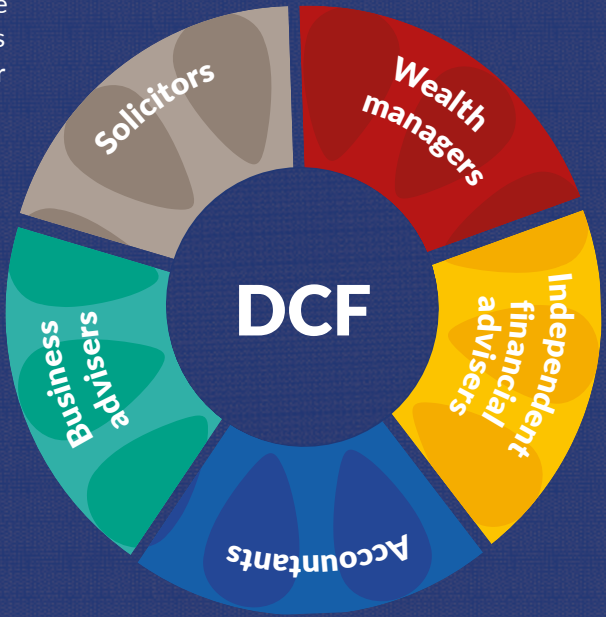
- DCF can match you with local social enterprises looking for significant investment
- 30% relief on tax income in return for making an investment in an enterprise that seeks to do good in its community
- An opportunity to become a business angel for asset-locked bodies by offering investment that they are unlikely to access elsewhere
- The reassurance of operating within a tried and tested model that is based on Enterprise Investment Scheme (EIS) and Seed Enterprise Investment Scheme (SEIS)

Could we be part of your team?

Dorset Community Foundation is one of 46 Community Foundations across the UK. The network distributed over £65 million in grants last year and the total managed endowment now stands at £500 million.

Community Foundations provide a safe haven for over 3000 trusts with asset transfers totalling in excess of £35 million.

We work with donors and their advisers to provide a permanent, flexible and growing source of local charitable funding that will directly help Dorset residents facing disadvantage.



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