



FFTC FAMILY OFFICE PARTNERS

Foundation For The Carolinas partners with family office professionals to maximize philanthropic impact for the families they serve.

Every family is unique, with its own philanthropic goals and vision for the future. Our local FFTC Family Office Partners team acts as a trusted partner, supporting family office professionals and the families they serve with demonstrated expertise in philanthropy.

Take a flexible, outsourced approach to charitable giving by partnering with FFTC. We help all types of family offices, as well as embedded family offices and family owned businesses, achieve tax, financial and legacy goals.

FFTC tailors each relationship to meet diverse needs with highly personalized support.

**Contact us today
for more information:**

Catherine Warfield, CFP®
Vice President & Director
Family Office Partners

Visit
220 North Tryon Street
Charlotte, NC 28202

Call
704.973.4515
800.973.7244

Email
cwarfield@fftc.org

Learn more
www.fftc.org

The Benefits of Partnership

With years of experience working with families throughout the region, FFTC Family Office Partners offer resources, thought leadership and best practices to make giving efficient and impactful.

We assist in defining charitable goals, articulating mission and translating plans into impactful, coordinated philanthropy that meets both personal and collective giving objectives.

Define Philanthropic Strategy

- ▶ Craft and design a philanthropic mission.
- ▶ Take a strategic approach to engaging the family in philanthropy.
- ▶ Articulate and document founder's philanthropic legacy plan.

Implement Giving Plan

- ▶ Utilize a variety of giving vehicles, depending on needs.
- ▶ Facilitate gifts of closely held business interests and real estate.
- ▶ Ensure compliance across a range of tax, legal and accounting rules and requirements.
- ▶ Integrate philanthropy with business and charitable succession planning.

Maximize Charitable Impact

- ▶ Develop processes tailored to unique interest areas and philanthropic priorities.
- ▶ Fully administer annual grantmaking programs, including grantee application and evaluation.
- ▶ Coordinate individual and collective family giving.

Families and family offices with significant assets or complex charitable goals may benefit from FFTC Family Office Partners. Inquire for more information on fees and scope of services desired.

Flexible Use of Vehicles

There is no one model for a family office, and one size does not fit all. Allow us to tailor a custom plan using a combination of philanthropic vehicles:

FFTC Donor Advised Funds

Take advantage of this flexible, efficient way to manage giving with superior tax advantages.

FFTC Subsidiary Foundations

Create a separate foundation while receiving public charity tax benefits and FFTC philanthropic resources.

FFTC Private Foundation Services

Outsource management of private foundation activities and requirements to the FFTC team.

FFTC Gifts of Business Interests

Support causes and reduce tax liability while maintaining control of your business.

FFTC Gifts of Real Property

Maximize charitable impact while taking advantage of substantial tax benefits.

Philanthropy is an art that benefits everyone. Come be inspired.

