

Giving Non-Cash Assets Start to Finish

The Boston Foundation is expert at turning non-cash assets into charitable gifts, offering direct and easy access to our senior level Non-Cash Assets Team. We can help you donate private company ownership interests, limited partnerships, real estate, insurance and more to meet your

philanthropic goals. We encourage donors and professional advisors to call us as soon as they begin considering a gift of non-cash assets. We stand at the ready to help you negotiate the entire process.

STEP 1: Exploratory Conversation	STEP 2: Receive Preliminary Confirmation	STEP 3: Sign the Agreement and Transfer Asset(s)	STEP 4: Sell the Asset(s)	STEP 5: Philanthropic Services
<p>You identify the asset(s) to contribute</p> <p>↓</p>	<p>Our Non-Cash Assets Team reviews the asset</p> <p>↓</p>	<p>If you want to set up a Donor Advised Fund with the asset(s), you complete a Fund Agreement and in some cases a Gift Agreement</p> <p>↓</p>	<p>TBF sells the asset(s) in accordance with an agreed upon schedule</p> <p>↓</p>	<p>You are assigned a relationship manager who will offer support and guidance to help you achieve your philanthropic goals</p> <p>↓</p>
<p>You contact the Boston Foundation (TBF)</p> <p>↓</p>	<p>We give you preliminary confirmation and work with you to move forward</p>	<p>We take care of the paperwork and send you all the tax documentation you need</p> <p>↓</p>	<p>Following the sale of the asset(s), the giving vehicle is funded with the proceeds</p>	<p>Join our large community of donors for site visits, workshops and seminars that will help and inspire you</p> <p>↓</p>
<p>We work with you to gather information and begin the process</p>		<p>You transfer ownership of the asset(s) to TBF in accordance with the agreement(s)</p>		<p>Gain access to fresh research about issues affecting Greater Boston and information about effective programs and nonprofits</p>

GET STARTED TODAY

Contact our Senior Vice President & Chief Philanthropy Officer, Kate Guedj, CAP®, at 617.338.2670 or Kate.Guedj@tbf.org

