



The San Diego  
Foundation

A foundation for your passion

# Hot Topics

## October 1, 2013

**Jerry Ray**

Associate Vice-President, Finance

Founded in 1975

- ✓ Assets (at 7/31/2013): **\$612 million**
- ✓ Endowments: **\$370 million**
- ✓ Number of funds: **1,814**
- ✓ Grantmaking FY 2010: **\$47 million**
- ✓ Grantmaking since 1975: **\$820 million**
- ✓ Seal of Approval





- Serving donor's philanthropic passion
  - San Diego Center for Charitable Giving
  
- Grant-making across the non-profit spectrum
  
- Endowments and non-Endowments
  - Preservation of charitable assets in-perpetuity
  - Give now, give away later

- Advised (endowment and non-endowment)
- Agency (endowment)
- Common Good (endowment and non-endowment)
- Corporate (endowment and non-endowment)
- Designated (endowment and non-endowment)
- Field of Interest (endowment and non-endowment)
- Mitigation (endowment and non-endowment)
- Scholarship (endowment and non-endowment)
- Legacy (endowment and non-endowment)



# The San Diego Foundation

Affiliated Charitable Foundations



## The Escondido Charitable Foundation

A proud affiliate of The San Diego Foundation



## The Carlsbad Charitable Foundation

A proud affiliate of The San Diego Foundation



## The Oceanside Charitable Foundation

A proud affiliate of The San Diego Foundation



## The 4SRanch-Del Sur Community Foundation

A proud affiliate of The San Diego Foundation



## The Chula Vista Charitable Foundation

A proud affiliate of The San Diego Foundation



## The La Jolla Community Foundation

A proud affiliate of The San Diego Foundation



## The Rancho Bernardo Community Foundation

A proud affiliate of The San Diego Foundation



## The Ramona Community Foundation

A proud affiliate of The San Diego Foundation


## Regional Focus

- San Diego Regional Disaster Fund
- San Diego Women's Foundation
- Charitable Real Estate Foundation
- The San Diego Center for Civic Engagement



- Planned giving services
  - Charitable Gift Annuities
  - Named endowments and legacy funds
  - Charitable trusts
  
- Partnership with professional advisors



- Ted Geisel – Dr. Seuss 
- Estate valuation
- Tax issues
- Dr. Seuss Fund
- Interest in partnership income
- Broad-based grant-making



- Sale of a business
- Tax situation
- Vacant land
- An Endowment Fund established to honor his father
- Grants geared toward
  - Education
  - Historic Preservation
  - Ethnic Culture
  - Community Needs



- The McLaughlins cared deeply about the North County region
- Donated \$10 million Endowment to benefit North County causes
- Left it as “board-discretionary” so that The San Diego Foundation could assess and fund the most pressing needs of that region

- Employee-owned stock
- Closely-held stock



**Thank you for the opportunity to share!**

**[www.sdfoundation.org](http://www.sdfoundation.org)  
619-235-2300**