

WHY WORK WITH US?



HARRISONBURG-ROCKINGHAM



PERSONALIZED SERVICE

Your philanthropic interests, goals, and dreams are our priority. We listen and learn from you to create a detailed plan to meet those goals.

COMMUNITY EXPERTISE

With more than 25 years in the Valley, we bring a deep understanding of community needs, nonprofits working to solve challenges, and programs that make a difference. If you are not sure where or how to begin, we can help – whether through researching potential recipient nonprofits, matching your charitable interests, or coordinating meetings with nonprofit leaders.

FLEXIBILITY

We accept traditional gifts of cash and securities, as well as more complicated gifts, such as partial or full gifts of real estate, an LLC or a percentage of an LLC, the transfer of private foundation or part of an estate. Your professional advisor who knows your personal situation can help you – and work with us, too.

PERPETUITY

We partner with you to help create and manage a forever fund, for a lasting endowment for your/a charitable legacy.

PRIVACY

We work with your wishes regarding recognition and/or commemoration. Whatever your reason, you can give securely knowing that your personal information will not be disclosed.

EXPERT INVESTMENT MANAGEMENT

Your funds can be invested in a general investment pool, managed by our investment committee and professional advisors, or you may also recommend that we consider working with your personal advisor.

EASE OF GIVING

Tired of writing all those checks and keeping track of all those receipts? We do the work for you and make charitable giving easy.

PUBLIC ACCOUNTABILITY

We provide record-keeping, gift receipts, oversight of investment management, and transparent reporting, in accordance with national standards for accreditation. Our audits and financial statements are published annually.

BENEFITS OF WORKING WITH US



HARRISONBURG-ROCKINGHAM

ORGANIZE, CUSTOMIZE, AND STREAMLINE YOUR GIVING.

We can help you design efficient giving strategies that meet your philanthropic goals. If anonymity is one of those goals, we can help.

LEVERAGE 100 PERCENT OF YOUR GIFT TOWARDS THE LOCAL GOOD.

Our fee structure is competitive and, best of all, that money goes back into the community by supporting the foundation's programs, staffing, and resources.

PARTNER WITH A FLEXIBLE, COLLABORATIVE TEAM.

With more than 25 years here in the Valley, we have a deep understanding of community needs and your giving options, as well as experience working with many financial advisors and nonprofit leaders.

MAKE A LASTING IMPACT.

Whether honoring the lives and interests of loved ones or supporting nonprofits working in areas you're passionate about, you can make a difference now and beyond your lifetime.

BENEFIT FROM TAX ADVANTAGES.

Your gift can maximize tax savings. We build legacies, growing community endowments so that philanthropic support can continue.



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Join us in our efforts towards making Harrisonburg and Rockingham County a supportive and thriving community for all.

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