

Business Service Offerings

Based upon what is important to your company, CFT for Business can assist with starting or growing your company's giving and community engagement program through volunteerism, employee giving programs, and other custom solutions.

| CORPORATE RESPONSIBILITY AND PHILANTHROPIC SERVICES | CHARITABLE FUND HOLDERS | ENGAGEMENT NETWORK | BOTH |
|---|--------------------------------|---------------------------|-------------|
| ACCOUNT MANAGERS AND ONLINE RESOURCES | | | |
| Access to dedicated corporate responsibility manager as your point of contact for all CFT services to ensure consistent personalized assistance | x | x | x |
| 24/7 online access to fund balance, resources and annual report of philanthropic activity | x | | x |
| PHILANTHROPIC CONSULTING | | | |
| Oversight of grants processing | x | | x |
| Training for grantmaking committee on topics related to company's giving program | | | x |
| Research and recommendations on areas of interest or potential nonprofit partners | x | | x |
| Facilitation of up to 3 site visits in North Texas annually to potential nonprofit partners | x | | x |
| GRANTS ADMINISTRATION | | | |
| Due diligence and grant payment for an unlimited number of US-based 501(c)(3) public charities | x | | x |
| Proposal review and grant implementation support | x | | x |
| Grant agreements and report tracking | x | | x |
| FUND INVESTMENT MANAGEMENT | | | |
| Choice of one or more of CFT's investment options | x | | x |
| Acceptance and liquidation of complex asset gifts such as real estate and Pre-IPO stock, etc. | x | | x |
| MARKETING SERVICES AND RESOURCES | | | |
| Link to your community relations/CSR/general website from CFT website | x | x | x |
| Highlight of corporate responsibility success stories on social media and in CFT collateral materials and/or press releases, as applicable | x | x | x |
| Access to corporate responsibility focused e-newsletter | x | x | x |
| Custom content such as podcast interviews | x | x | x |
| Listing of corporate partners in CFT's Annual Report | x | x | x |

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| EMPLOYEE/CEO ENGAGEMENT AND EDUCATIONAL OPPORTUNITIES | | | |
| Monthly community service events and supply drives | x | x | x |
| Cause-Minded Conversations | x | x | x |
| Community hackathons | | x | x |
| Freedom Day | | x | x |
| Curated list of year-round volunteer opportunities | | x | x |
| Networking events | x | x | x |
| Engagement Captain Roundtables | | x | x |
| GiveWisely (seats at the series) | | 1 | 2 |
| Invitation to CFT site visits | x | | x |
| Customized philanthropic strategy development | | x | x |
| Leadership development workshops | x | x | x |
| Employee giving circles | x | | x |
| Skills-based volunteering - curated list of opportunities | | x | x |
| Nonprofit board engagement training and matching | | x | x |
| Good Company Seal of Approval program | x | x | x |
| Annual fund holder dinner | x | | x |
| Affinity group participation - CEOs/Entrepreneurs/Women/Minority-owned businesses | x | x | x |
| Access to CFT meeting room space (certain restrictions may apply) | x | x | x |
| Custom volunteer project planning and implementation | | x | x |
| NORTH TEXAS GIVING DAY | | | |
| North Texas Giving Day employee giving support and trainings | x | x | x |
| OTHER CUSTOM OFFERINGS (OTHER PRICING APPLIES) | | | |
| Custom employee giving campaign | — | — | — |
| North Texas Giving Day custom portal | — | — | — |
| Event sponsorships (review additional sheet) | — | — | — |
| GiveWisely Series -custom program for your company | — | — | — |

Business Service Fees

CFT’s fees offset the costs associated with administering a fund and help cover our professional services while sustaining the work of the foundation in the community. These costs include staff time devoted to investment oversight, grantmaking and record keeping. Fees are reviewed annually and assessed monthly. CFT may adjust fees as appropriate, at its discretion.

Charitable Fund Annual Service Fees:

| FUND BALANCE | SERVICE FEE | MINIMUM MONTHLY FEE |
|----------------------------|--------------|---------------------|
| Up to \$1,000,000 | 1.00% | \$100 |
| \$1,000,000 to \$3,000,000 | 0.60% | \$100 |
| \$3,000,000+ | 0.40% | \$100 |

Fund options include donor-advised funds and executive giving funds.

Engagement Network Annual Service Fees:

| NUMBER OF EMPLOYEES | ANNUAL FEE |
|---------------------|-----------------|
| Employees <100 | \$3,000 |
| Employees <500 | \$5,000 |
| Employees >500 | \$10,000 |

Youth Arts Education

In corporate philanthropy, Neiman Marcus has an ear for youth arts education. Research has shown that students receiving arts training graduate at higher rates, score higher on the SAT, are better creative problem solvers and become engaged civic leaders. The Heart of Neiman Marcus Foundation Fund at CFT was established to strategically invest in organizations providing support for arts education for underserved youth.



In 2014, one of the grantees supported was the Dallas Symphony Orchestra's Young Strings program, which discovers and develops the talent of young African American and Latino string players. CFT is proud to partner with Neiman Marcus through various funds for their corporate philanthropy. To date, Neiman Marcus has provided over \$10 million in grants for disaster relief, youth arts education, associate financial assistance and other charitable efforts. One of Neiman Marcus' core organizational values is "Be All Heart." By partnering with CFT, they have ensured that their philanthropic heart will continue to beat stronger than ever.

Work for Higher

How does a 15-person law firm make a difference in a community? Shields Legal Group found a way with the help of Communities Foundation of Texas. The firm leveraged their business-advised fund at CFT and launched Impact/365, a program that challenges each employee to take action to help others every day. This year, they focused on helping homeless children, and came to CFT for advice.



CFT introduced them to Hope Supply Company, which meets the critical needs of North Texas homeless children by providing food and daily essentials. In a drive they called “Hope in a Box,” the employees raised more than \$2,000 and created 60 gift-wrapped hygiene kits for homeless kids. Working with CFT has not only helped the firm make a difference but also elevated employee morale and client relationships – gifts any business can appreciate.

Businesses Working with CFT

| | | |
|--|---|---|
| 1st Global | HumCap | Simon Greenstone Panatier Bartlett, PC |
| Amarr Garage Doors | Hunt Consolidated, Inc. | Staff One |
| Anderson Trail | Ignite Sales | Stericycle |
| Armanino LLP | Independent Insurance Agents of Dallas | Stratifi |
| ASI Business Solutions | InSite Interactive | Symphonic Source |
| Austin Industries Inc | The InSource Group | Tango Networks |
| Bank of America | JCPenney | Texas Instruments Foundation |
| BB&T | Lee Financial | Triune |
| Bioworld | Loopback Analytics | True North Advisors |
| Brennan Financial Services | Luscinia Health | UT Dallas |
| The CFO Suite | MarketWave | Vent-a-Hood Fund |
| Civitas Capital Group | Montgomery Coscia Greilich LLP | Venturity Financial Partners |
| Corgan | Moss Adams | Verge Ventures, LLC |
| Core24 | MWA | WFAA |
| D Magazine | Neiman Marcus Group | Womack Machine Supply |
| Dale Carnegie Training | NorthPark Center | |
| Dallas Business Journal | Nymble | |
| Dallas Morning News | Oliver Wyman | |
| DHD Films | Optimal Blue | |
| ES OnDemand | Pena Search | |
| EO Dallas | Platinum IDS | |
| ExamSoft | Principal Solar | |
| Fresh Ink | Quisitive | |
| Freshbenies | Rasa Floors | |
| Frontera Strategies, LP | Republic Companies, Inc. | |
| GeoWhiz Universe LLC | Risch Results | |
| Goldman Sachs | RHSB | |
| Goldman Sachs 10k Small Businesses at DCCCD | Robertson, Grieger & Thoele | |
| Grow South - Dallas | Sendero | |
| Hall Financial | SevaYatra | |
| Hazel's Hot Shot | SFMG Wealth Advisors | |
| hck2 Partners | Shields Legal Group | |