

THE POWER TO SHAPE A BRIGHTER FUTURE

STARTS WITH A FUND AT THE PITTSBURGH FOUNDATION



Constructed in 1959 during a period of urban renewal, the Fort Pitt Bridge, the world's first computer-designed double-decker bowstring arch bridge, spans the Monongahela River near its confluence with the Allegheny River.

WHAT WILL YOUR STORY BE?

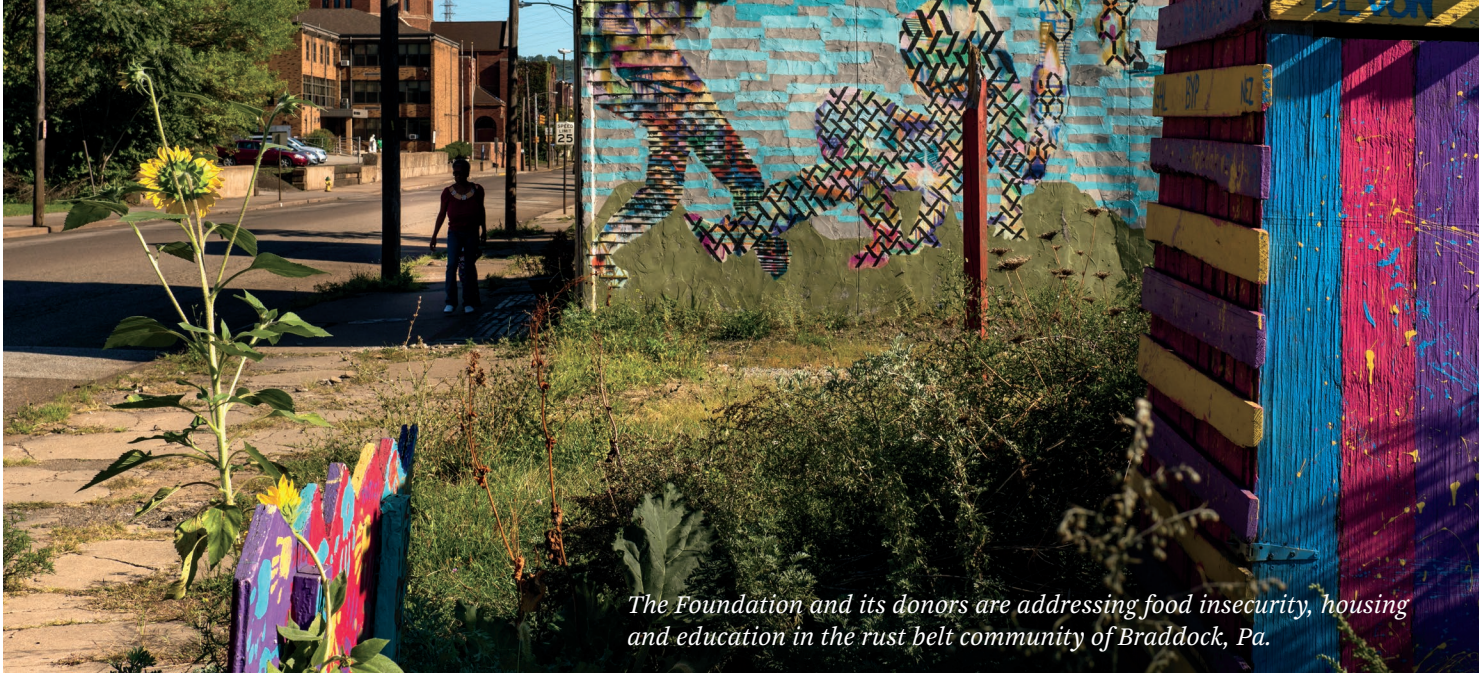
Funds are established by donors who strive to make a difference in our community. Here are some of the great things our donors are doing with their funds.

- **Supporting the arts**
- **Furthering education**
- **Funding cutting-edge research**
- **Helping animals**
- **Supporting vulnerable and low-income populations**
- **Conserving the environment**
- **Supporting economic development**
- **Providing services to children, youth and families**
- **Aiding our veterans**
- **Creating an unrestricted fund**





Grants to the Homeless Education Network support educational services and parent/child interactions for children in the Pittsburgh Public School District experiencing homelessness. Nearly 3,000 children in the district experienced homelessness in 2014-2015.



The Foundation and its donors are addressing food insecurity, housing and education in the rust belt community of Braddock, Pa.

THE POWER TO CHANGE LIVES AND COMMUNITIES

ARE YOU READY TO DO GREAT THINGS WITH YOUR PHILANTHROPY?

The Pittsburgh Foundation has more than 70 years of experience helping individuals and families to make a lasting and powerful difference in the lives of others. As one of the nation's largest community foundations, we are deeply connected to the most current thinking on effective giving and to the needs of Pittsburgh and the surrounding region. We can help you realize the power of charitable giving by customizing a plan that matches your wishes and reflects expert advice from the community.



THE POWER TO USE OUR EXPERIENCE

The Westmoreland Museum of American Art is a beneficiary of grants by the Foundation and its donors.

We manage more than 2,000 funds for people who share a passion for giving and a deep commitment to making this community better. Professional staff will assist you and your advisors in creating a plan that fulfills your philanthropic and financial goals. Whether it's supporting a favorite charitable program or teaching your children about philanthropy, we can provide advice, resources and options.

FLEXIBILITY

Donors choose from nine different fund types and a wide range of fund options, from a donor-advised fund with a minimum of \$10,000, to a supporting organization, with a minimum of \$2 million.

EASE OF ADMINISTRATION

We handle all the reporting, audits and necessary paperwork so our donors focus on fulfilling and growing their philanthropy.

PERSONALIZED SERVICES

We take service seriously. As a donor, you will be assigned a representative who will act as your liaison to answer all of your questions and provide you with customized support based on your needs and interests.

DONOR RESOURCES

Through educational events and site visits, donors learn more about the needs of the community and how to be more actively engaged in their philanthropy.

ACCESS TO GRANT-MAKING EXPERTISE

Our professional grant-making staff is available to share knowledge of community needs and to help donors decide where to invest their charitable dollars to achieve the greatest impact. We also offer site visits to area nonprofits of interest to donors.

FINANCIAL REPORTS

The Foundation provides each donor with fund statements and investment summaries, showing the balance of their fund, amounts available for grantmaking, details on gifts and grants, and investment allocations and returns.

ONLINE SERVICES

“My Pittsburgh Foundation” is an exclusive online service that puts giving at your fingertips. Make grant recommendations, see the market value of your fund, check on what is available for grantmaking and more.

RESEARCH SERVICES

Information about local nonprofits is offered through our Pittsburgh Gives program at pittsburghgives.org. We can also assist you in creating a custom presentation of organizations serving your field of interest.

CHARITABLE GIFT CARD

This gift card enables people to experience the joys of philanthropy by supporting an organization of their choice.

WISH BOOK

The Pittsburgh Foundation Wish Book is published annually and provides individuals and families with a unique opportunity to make a difference by purchasing much-needed tangible items of \$2,500 or less for nonprofit organizations.



The Pittsburgh Foundation supports exemplary artists like fashion designer Tereneh Mosley, who won the 2016 Carol R. Brown Creative Achievement Emerging Artist Award.

CENTER FOR PHILANTHROPY

This innovative resource from The Pittsburgh Foundation is designed for donors who wish to take a more active role in their philanthropy. Our philanthropic advisors work closely with donors to address critical issues in the community and provide collaborative grant-making opportunities, donor education and next-generation engagement opportunities.

THE CENTER FOR PHILANTHROPY PROVIDES DONORS WITH CUSTOMIZED PHILANTHROPIC SERVICES LIKE:

- Guidance on multi-generational philanthropy.
- Family meeting facilitation.
- Advice and support from professionally trained staff.
- Impact Giving Circles for specific charitable interests.

THE POWER TO CHOOSE A FUND THAT IS BEST FOR YOU

We help people from all walks of life to establish funds that are right for their financial situations, lifestyles, interests and goals.

Grantee Hope Garden provides after-school activities and healthy food for children in New Kensington.



TYPES OF FUNDS AT THE PITTSBURGH FOUNDATION

DONOR-ADVISED FUNDS

- Allow donors to recommend grants to specific nonprofit organizations in the community, throughout the United States and other parts of the world.
- The original donor may determine what the purpose of the fund will be after the donor's death, or may appoint future advisors who will advise on its distribution annually.

SCHOLARSHIP FUNDS

- Benefit students locally and throughout the United States.
- Elementary, high school, college, graduate or technical school students.
- Donors may choose the type of assistance they would like to provide, i.e. tuition, the purchase of school-related equipment and supplies, etc.

DESIGNATED FUNDS

- Allow donors to specify eligible, tax-exempt nonprofit organization(s) to receive annual grants in perpetuity.
- Should the organization(s) cease to exist after the donor's death, the Foundation will honor the donor's original intent by making grants to an existing organization with the same mission or purpose.

FIELD OF INTEREST FUNDS

- Foundation staff determine use of these funds per the donor's named areas of interest. Examples may include the arts, education, economic development and animals, to name a few.
- Specific charities would not be named, but all grants from the fund would be directed toward programs in the region that address the field of the donor's interest, unless otherwise specified.

AGENCY ENDOWMENT FUNDS

- Permanent endowments established by local nonprofit organizations and their donors provide ongoing support for that organization's programs.

SUPPORTING ORGANIZATION

- Supporting organizations are an option for philanthropists making initial gifts of \$2 million or more.

MEDICAL RESEARCH FUNDS

- Permanent endowments established by donors support investigation into the cause and cure of a variety of diseases and health conditions.

UNRESTRICTED GRANTMAKING

- Donors may choose to have their financial gift placed in The Pittsburgh Foundation's unrestricted grant-making program.
- Foundation staff determine use of these funds based on three funding categories: self-sufficient individuals and families, healthy communities and a vibrant democracy.
- We strive to match our donors' philanthropic goals with our community's most pressing charitable needs.

To learn more about how our donors are using their funds to support the community, please visit pittsburghfoundation.org/news/stories.



Donor Barbara Miklos honors the memory of her brother, Dr. Michael Miklos, through a scholarship fund for medical students.

THE POWER TO GIVE AS YOU WISH

There are many ways to make a charitable gift through The Pittsburgh Foundation.

The Foundation is a trusted resource for donors and their professional advisors as they search for ways to give back to the community, while maximizing their tax advantages. It is important to consider all the financial and tax implications of creating a fund. We will help you and your professional advisors create a plan that achieves your philanthropic, financial and estate planning goals.

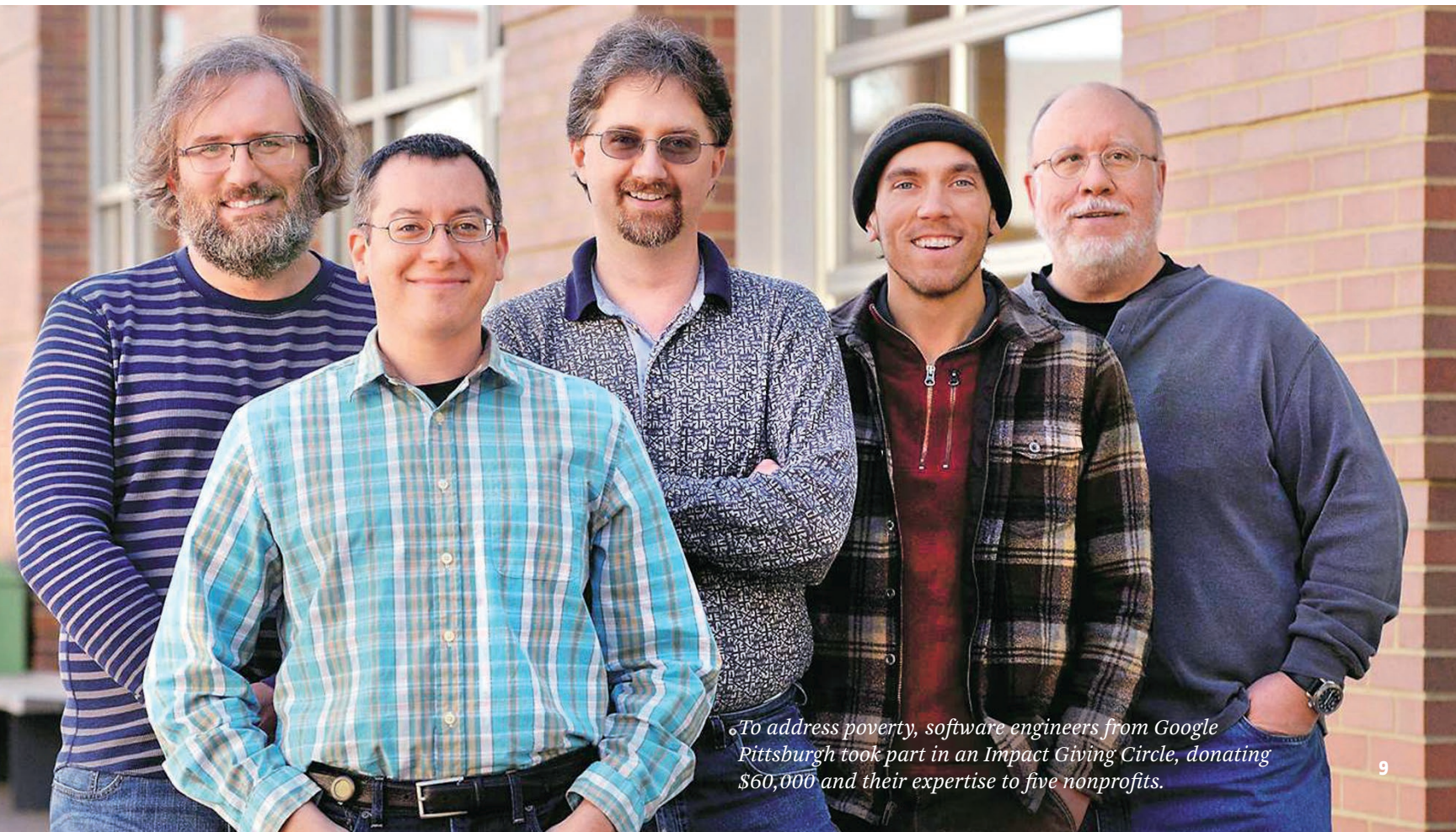


Pittsburgh Community Broadcasting Corporation benefits from the Foundation's public media grantmaking.

WAYS TO ESTABLISH A FUND

YOU MAY ESTABLISH A FUND AT THE PITTSBURGH FOUNDATION WITH:

- Cash.
- Appreciated stock.
- IRA rollover.
- Closely held stock – “C” corporations, “S” corporations, partnership interests and LLCs, even oil and gas rights.
- Real estate or partial interest in real estate – including retaining the right to live on the property during your lifetime.
- Transfer of a private or family foundation.
- Planned gifts (bequests) utilizing cash, appreciated stock, closely held stock, life insurance, real estate and retirement fund assets such as 401(k)s and IRAs.
- A Charitable Gift Annuity that makes periodic payments to you as provided in the gift annuity agreement.
- A Charitable Remainder Trust (Annuity or Unitrust) in which you and/or others retain the right to receive income for life, or a period of years, with the remainder to be distributed to your fund at The Pittsburgh Foundation.
- A Charitable Lead Annuity Trust that makes a fixed annual payment to your fund at The Pittsburgh Foundation for a stated period of years, after which the remaining assets are transferred to your children or other named beneficiaries. The tax advantages are greatest when a trust is created while interest rates are low.



To address poverty, software engineers from Google Pittsburgh took part in an Impact Giving Circle, donating \$60,000 and their expertise to five nonprofits.

Cellist and donor Charlotta Ross and her granddaughter, McKenzie Ross, 12.



THE POWER TO CREATE YOUR OWN LEGACY

The Pittsburgh Foundation offers a wide range of funds that give you the ability to use your good fortune to do great things.

PAUL J. AND CHARLOTTA ROSS YOUNG MUSICIAN'S FUND

The power to be instrumental in a young person's future.

The gift of music can change lives. As Charlotta Klein Ross discovered, it is a gift that can reverberate for generations. Since she was 15, Charlotta wanted to become a symphony musician. Because her family could not afford the expensive training, her cello teacher reached out to their community to help fund her education — igniting a career that would span 44 years with the Pittsburgh Symphony Orchestra.

In Pittsburgh, Charlotta met her future husband, Paul. His journey took him from Pittsburgh's Hill District to become the first African American to be awarded a full-time contract to perform with the Pittsburgh Symphony Orchestra. After Paul died in 2000, Charlotta and their symphony colleagues established a fund in his memory at The Pittsburgh Foundation — a fund that continues to help children whose families are unable to afford musical training — the same kind of training that had helped Paul and Charlotta realize their dreams. "Many people don't have a chance to make a difference in other people's lives," says Charlotta. "Musicians can do that. It's a special blessing — one that I've been very thankful for."

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| Type of Fund: | Scholarship |
| Date Established: | 5/31/01 |
| Initial Gift: | \$10,000 |
| Market Value (2016): | \$20,397 |
| Grants to Date: | 89 grants totaling \$15,205 |

JOURNEY FORWARD-PITTSBURGH FUND

The power to plan for the journey forward.

As Pine-Richland eighth grader Claire Senita lay on the mat after a gymnastics accident, she couldn't have imagined how many lives she'd change in her effort to get back up. Claire was diagnosed with a spinal-cord injury that left her paralyzed from the neck down.

While at college in Boston, Claire fought to regain control of her body with the help of Journey Forward, an organization that uses intense physical therapy to enhance the lives of those with spinal-cord injuries. She came home not just with greater mobility, but a passion to help others achieve the same. Claire decided to raise money to open a Journey Forward facility in western Pennsylvania. She chose The Pittsburgh Foundation and in 2016, opened the Journey Forward-Pittsburgh Fund, a decision that could change the futures for thousands of people fighting back from spinal-cord injury.

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|-----------------------------|----------------------|
| Type of Fund: | Donor Advised |
| Date Established: | 12/17/15 |
| Initial Gift: | \$14,503 |
| Market Value (2016): | \$39,338 |
| Fund goal: | \$300,000 |

CHARLES HARBAUGH AND HELEN MASON MOORE FUND

The power to help the community.

Two years after Charles Harbaugh Moore died, his wife, Helen, established this fund to help wherever the community need was greatest. Mrs. Moore continued to be a force in the lives of others through the power of poetry. She celebrated the works of many famous poets through her work at The Ellis School, where she taught and was head of school from 1958 to 1971.

When the International Poetry Forum brought Princess Grace to Pittsburgh in 1978, Mrs. Moore chaired the committee. She introduced the great poet W.H. Auden when he visited the Poetry Forum. In 1979, Gov. Dick Thornburgh named her a Distinguished Daughter of Pennsylvania. And in 1987, she received Metropolitan Pittsburgh Public Broadcasting's rarely given "Q Award for Excellence" for a radio series she produced. Mrs. Moore died at age 95, but the community continues to benefit from their generosity.

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| Type of Fund: | Unrestricted |
| Date Established: | 6/21/1991 |
| Initial Gift: | \$37,306 |
| Market Value (2016): | \$61,583 |
| Grants to Date: | 20 grants totaling \$62,914 |

Donor Clair Senita is working to bring a Journey Forward rehabilitation gym to Pittsburgh.



LOIS TACK THOMPSON FUND

The power to envision a better world.

“The Pittsburgh Foundation was made for a person like Lois Thompson,” a good friend of hers said. “She kept a low profile and she believed in community service and commitment.” Though born into wealth, she lived conservatively and managed her resources with care. A private person, Lois spent her time with close friends and in quiet charitable pursuits. She loved all animals and her dogs were her constant delight.

Dignified and elegant, Lois took a no-nonsense approach to giving. Her fund aided groups that provided services to blind people, regardless of age. She also gave to institutions for unwanted animals. Upon her passing, Ms. Thompson left an additional bequest of \$15 million that will ensure that both people and animals get the help they need for years to come.

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| Type of Fund: | Unrestricted |
| Date Established: | 12/20/1984 |
| Initial Gift: | \$100,000 |
| Bequest (1991): | \$15,000,000 |
| Market Value (2016): | \$28,241,279 |
| Grants to Date: | 303 grants totaling \$22,767,784 |

REV. ED BOWEN CHARITABLE FUND FOR THE CHILDREN OF CRAFTON

The power to leave a lasting legacy.

For some people, a terminal cancer diagnosis may seem like the end. Rev. Ed Bowen chose to see it as a beginning. Rev. Bowen took the pulpit at Crafton United Presbyterian Church in 2000 and built a more vibrant community, organizing a youth club, dances and an after-school program. He volunteered for school activities and joined the PTA.

In 2012, he accepted an assignment in West Virginia, but just two months later, he was diagnosed with stage-four cancer. He decided to return to Crafton and the people who had become part of his life for his final years.

In 2013, he established the Rev. Ed Bowen Fund for the Children of Crafton, which provides \$10,000 a year, indefinitely, to promote the general welfare of the children of Crafton. Though Rev. Bowen passed away in December of 2016, his generosity and his legacy never will.

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| Type of Fund: | Designated |
| Date Established: | 3/16/13 |
| Initial Gift: | \$50,000 |
| Market Value (2016): | \$275,265 |
| Grants to Date: | Six grants totaling \$44,422 |



Rev. Edward Bowen pictured with two of the children who benefit from his fund.

Donor Rita McGinley's fund provides permanent support for education and vulnerable populations.

RITA M. MCGINLEY FUND

The power to inspire generations of generosity.

Rita McGinley grew up in Braddock during the Great Depression, when giving and sharing were everyday experiences. She remembers one frigid winter when her father, Barney McGinley, discovered that the town's Lithuanian church couldn't afford coal. He mustered the men of his own parish, St. Brendan's, to raise money to buy coal so St. Isidore could light its furnace. The coal did more than warm his neighbors at worship. It enflamed the spirit of generosity in his daughter's heart.

"He had what you might call the joy of giving. I saw him helping people from the time I was a little girl. I noticed what my father was doing and decided to follow in his footsteps," she said.

Rita also learned from her mother, Katherine McGinley, who taught at a small Braddock business school, and began a 45-year career as a teacher and guidance counselor in the General Braddock, then Woodland Hills school districts.

Meanwhile, Rita's father and his lifelong friend, Art Rooney Sr., speculated in bars, boxing — and founded a franchise in a fledgling football league, the Pittsburgh Steelers.

When her father died, Rita inherited a 10 percent stake in the team. Upon her retirement, she established the Rita M. McGinley Foundation funded through the sale of her shares of the team, which she used to create her Pittsburgh Foundation fund.

Rita would spend the next 25 years working with the Foundation to contribute to schools, institutions and organizations that serve the poor, the elderly and disadvantaged youth. Her generosity continued through the last year of her life, endowing The Rita M. McGinley Center for Student Success at Carlow University and establishing the Rita M. McGinley Chair of Early Learning and Children's Media at the Fred Rogers Center.

Rita's legacy now passes to Rita's successor advisors, her nephews, John R. McGinley Jr., and Bernard L. McGinley and her great niece, Marie Stapinski, who carry the flame that was lit in the furnace of St. Isidore's so many years ago.

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| Type of Fund: | Donor Advised |
| Date Established: | 5/23/89 |
| Initial Gift: | \$445,002 |
| Market Value (2016): | \$1,794,464 |
| Grants to Date: | 204 grants totaling \$934,110 |



RITA M. MCGINLEY FUND GIVING HIGHLIGHTS

- Operation Safety Net
- Mercy Hospital
- The Extra Mile Education Foundation
- Duquesne University
- Saint Bonaventure Parish School
- Oakland Catholic and Central Catholic High Schools
- The Little Sisters of the Poor
- Carnegie Library of Pittsburgh
- Phipps Conservatory
- The Greater Pittsburgh Guild for the Blind
- The Capuchin Franciscan Friars
- The Jubilee Kitchen
- The Diocese of Pittsburgh

FREQUENTLY ASKED QUESTIONS

TO WHAT TYPES OF ORGANIZATIONS OR PROGRAMS MAY I GRANT?

You may grant to any nonprofit organization in the United States with a 501(c)(3)-tax status or to foreign organizations with nonprofit equivalency. Most nonprofit organizations have this status. Our Grants Administration Department will determine the tax status of any potential grantee.

WHEN CAN I START MAKING GRANTS?

You may start making grants immediately provided there are funds available in your grant-making account.

IS THERE A MINIMUM GRANT SIZE?

We can process grants of \$200 or more.

HOW OFTEN ARE GRANT CHECKS MAILED?

Grant checks are mailed weekly.

MAY I GRANT OUTSIDE ALLEGHENY COUNTY?

Yes. You may grant to any nonprofit organization in the United States, or to any organization that has an affiliate in the United States or abroad.

HOW DO I ADD TO MY FUND'S ENDOWMENT?

You and others may donate any amount to your fund, as often as, and whenever, you wish.

CAN I GIVE STOCK?

Yes. In order to ensure that your gift is properly credited to your fund, please call your philanthropic advisor before making the transfer. Your representative can assist you with the process.

CAN I ADD MONEY TO MY GRANT-MAKING ACCOUNT?

You may add to your grant-making account or to the principal of your fund at any time. Please indicate whether you want the gift credited to grantmaking or principal.

AM I ABLE TO KEEP MY FINANCIAL ADVISOR?

Yes. In addition to the Legacy Funds program, for donors with an existing investment advisory relationship, the Foundation may be able to work with your advisor either through the American Funds program or a customized approach.

THE POWER TO GIVE FOR MANY REASONS

There are many reasons for creating a fund at The Pittsburgh Foundation. The motivation of each donor is different, but the outcome is the same. Our donors make tremendous contributions to the community and make Pittsburgh a better place to live for all of us.

CREATE A FAMILY LEGACY

Named funds at The Pittsburgh Foundation exist in perpetuity, creating a lasting legacy for donors and their families. These funds are a wonderful means to give back to the community in a way that is significant and permanent.

LET US DO THE HARD WORK

Whether you establish a fund with a current or future gift (bequest), you have the help of our experienced staff to set up and administer your fund, manage its successful growth and ensure that your charitable objectives are met.

WATCH OUR COMMUNITY FLOURISH

The Pittsburgh Foundation is a permanent trust for the Pittsburgh community. Donors are assured that the charities and causes they care about most receive the support they need – now and in the future. Additionally, the impact of donors is strengthened significantly when they join with the Foundation to help fund critical needs.

GO WITH A RESPECTED LEADER

With nearly 70 years of experience as a steward of charitable gifts for the community, The Pittsburgh Foundation has set a standard for community foundations across the country.


ENJOY TAX BENEFITS

Because we are a community foundation and a public charity, you will receive the maximum tax benefits permitted by law. Our philanthropic advisors can guide you through the many options available to you.

MAKE YOUR GIFT WORK HARDER

We find every way possible to make the most of your charitable gift. And we pride ourselves on keeping our annual administration and investment management fees competitive with industry standards of both community foundations and commercial gift funds.

| | DONOR-ADVISED FUND OF THE PITTSBURGH FOUNDATION | COMMERCIALY AFFILIATED CHARITABLE FUND | PRIVATE FOUNDATION |
|---|--|--|--|
| Minimum Endowment | \$10,000 | Varies, \$5,000 to \$50,000 | Council on Foundations estimates a private foundation is inefficient when less than \$5m |
| Administrative Fees | 1% < \$1m .85% \$1m - \$2m .70% \$2m - \$5m .60% \$5m - \$10m .50% > \$10m | Vary, 0.60 to 2.5% May include mark-up for financial advisor | Vary |
| Investment Management Fees | .18% to 1.25% (based on investment portfolio selected) | Vary, 0.30 to 2.0% | Vary, based on investment management |
| Other Fees | No additional fees | No additional fees | Recordkeeping fees Accounting fees Tax and audit preparation |
| Excise Taxes | None | None | 2% of net investment income annually |
| Valuation of Gifts | Fair market value | Fair market value | Fair market value for publicly traded stock, cost basis for all other gifts, including closely held stock and real property |
| Tax Deduction Limits for Gifts of Cash | 50% of adjusted gross income | 50% of adjusted gross income | 30% of adjusted gross income |
| Tax Deduction Limits for Gifts of Stock or Real Property | 30% of adjusted gross income | 30% of adjusted gross income | 20% of adjusted gross income |
| Grantmaking | Donor/Advisor recommends grants to any 501(c)(3) in U.S. or international, approval required by TPF Board Grant checks cut weekly Ability to distribute grants from principal No minimum payout Expertise of TPF staff available for consultation Built-in peer networking Personal donor services representative Informational sessions and activities on charitable organizations and issues Donor may recommend investment manager (Subject to approval by The Pittsburgh Foundation Investment Committee) Access to The Center for Philanthropy | Donor/Advisor recommends grants, approval required by CACF trustees No personal representative Many require 5% minimum payout No consultation | Donor appoints board, which controls grantmaking Restrictions on scholarship and research grants 5% minimum payout required Grantmaking services, fee-based Donor education, fee-based |
| Future Purpose / Legacy Planning | Donors may determine the future purpose in the fund agreement naming individual charities to receive annual grants in perpetuity. Donor may name areas of interest and TPF Program staff will award grants in named areas, or successor advisors. | Fund is split between named successors. If minimum is not achieved, remaining balance must be granted out in 90 days or fund balance will be added to unrestricted charitable gift pool directed by CACF trustees. | Family involvement in perpetuity, no restrictions. |



If you or your client has an interest in charitable giving, contact us and we will help you every step of the way. The initial consultation won't take long and the benefits will last a lifetime.

Call 412.394.2630, email development@pghfdn.org or visit us at pittsburghfoundation.org.



The power to do great things.

**FIVE PPG PLACE, SUITE 250
PITTSBURGH, PA 15222
pittsburghfoundation.org**

A view from Pittsburgh's North Shore frames the city between the Andy Warhol Bridge (left) and the Roberto Clemente Bridge (right), two of the Three Sisters Bridges, the first self-anchored suspension bridges in the U.S.

