FINANCIAL BENEFITS FOR BUSINESSES

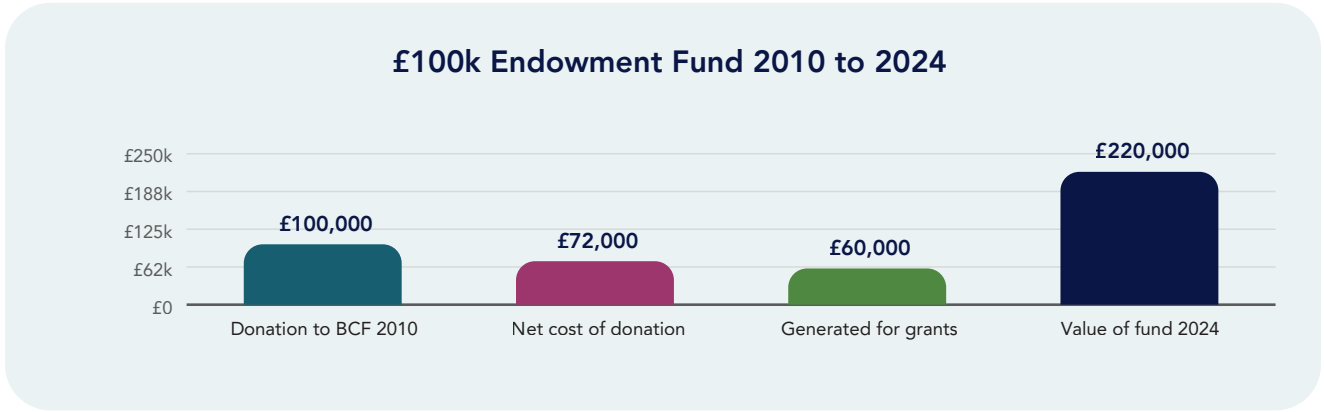
Endowment Fund with a corporate gift

BERKSHIRE COMMUNITY FOUNDATION
Local Giving. Lasting Impact.

A charitable gift made by a UK business to Berkshire Community Foundation (BCF) is eligible for corporation tax relief at their appropriate rate, which reduces the cost of the donation to the company by up to 25%.

Starting an Endowed Fund with the donation creates a source of long term sustainable grant funding for local causes in the name of the business. Once received the donation is invested by BCF with other such funds to generate capital growth and income for charitable distribution.

As an illustration an Endowed Fund of £100k created in April 2010, at a net cost to the business of £72k, would be worth £220k as at March 2024 and in that time would have generated £60k for grants to local causes. So that after approximately 25 years the original value of £100k will have been received but the fund will continue to generate income year in and year out.



Investment oversight

BCF's Finance & Investment Committee makes recommendations to the Trustee Board as to the Foundation's financial and investment strategy and is charged with monitoring and regularly reporting to the Board on the performance of the Foundation's investments.

The Foundation's current fundamental investment policy addresses the key objective to **"seek to achieve year-on-year an annual return of at least 4%, net of fees and averaged over three years, whilst preserving the Foundation's capital in real terms".**

The Foundation pursues a policy of mitigating investment risk attached to its funds, by ensuring a mixed diversified portfolio of cash, fixed interest securities and equity and property investments.

Alternatively, please email philanthropy@berkshirecf.org

Berkshire Community Foundation
100 Longwater Avenue, Green Park,
Reading, Berkshire RG2 6GP

Tel: 0118 930 3021
Email: info@berkshirecf.org
Web: www.berkshirecf.org

Facebook, Instagram & LinkedIn:
@berkshirecommunityfoundation

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