



COURTESY

Pictured standing on the grounds of the Taos Community Foundation offices at 115 La Posta Rd, from left to right, are: Lisa O'Brien, TCF Director; Susan Shivas, Advancement Associate; Lisa Tringali, Program Associate; Helen Forte, Director of Community Impact; Heather McPeck, Finance Associate; and Traci Chavez McAdams, Director of Operations.

# Investing in Taos Community Foundation is a Win-Win

## It's true: 'tis the season for gifts and giving. What's also true: 'tis the season for investing with Taos Community Foundation.

As we welcome the holiday season, it is quite common for people to make donations to charitable organizations in support of the causes that are important to them. Taos Community Foundation offers a way to do more than make a holiday donation. While often only recognized for its strong grant making role in the community, Taos Community Foundation is also well positioned to accept IRA contributions as a specific, alternative charitable gift. This creates a win, win, and win again scenario.

### Alternative gift giving

Taos Community Foundation also referred to as the 'Foundation,' has always had the ability to accept more complex gifts. "We are able to accept a variety of gifts, including real property, stocks, securities and on at least one previous occasion, gemstones, noted Lisa O'Brien, Foundation Director. "Included in this list of potential gifts, are IRA contributions," she added. According to Foundation Board Emeritus member, Scott McAdams,



Financial Advisor with Knight Financial, "a required IRA minimum distribution can raise total income which can create an unwanted tax situation. For the philanthropic-minded, rather than take that required distribution, those funds can be directly transferred to the Foundation who will then invest the money to allow for greater charitable reach." In essence, with the ability to avoid a higher income tax, a gift of up to \$100,000 to the Foundation creates the ability to invest and pay out dividends for decades to come. Win, win, and win again.



Taos Community Foundation partners with local nonprofits for their investment goals

"The Foundation currently holds charitable funds for 37 local non-profit organizations," shared O'Brien. "This has been one of the larger areas of growth for us, and we are proud of the partnership we have with these organizations. When we receive gifts such as an IRA minimum distribution, the benefactor can choose one or more of the funds held for a designated organization."

The interest income on the investment is then available to the organization with a long-term distribution plan in mind. Foundation staff will

assist individuals in finding the right 'home' for this type of charitable gift. As noted by McAdams, "the Foundation offers excellent donor services in assisting individuals and families with identifying the causes important to them."

One advantage of an end of the year charitable gift is the qualified IRA gift is not tallied with itemized charitable deductions. This gives the benefactor the ability to exceed the limited gift deduction and potentially enable them to give a bigger charitable gift than they could with just donating cash or other assets. "A big misconception about the Foundation is that we are a pass-through entity for fundraising dollars," explained O'Brien. "We are not. Our focus is on building endowment funds for long-term growth. The larger our portfolio, the bigger impact we have in the community."

The Foundation has grown over the past year both financially and as an organization. Assets are now just over \$23 million, held in more than 170 different charitable funds.

Grantmaking in the 2021 fiscal year, awarded over \$2.5 million in community awards. To continue to meet the needs of both donors and the community, the Foundation has welcomed two new full-time employees. Susan Shivas, who recently joined the team as an advancement associate, commented, "I am excited to begin my work at the Foundation. It is a privilege to work with donors who have such high aspirations for their gifts."

For more information on making an IRA gift to the Foundation, or to explore other charitable gift options, please contact the office directly. The office is open to the public, under NM Safe Certification practices. The Foundation is available to assist with all end-of year gifts, through Dec. 31, 2021. Please check the website for specific holiday hours.

**Taos Community Foundation**  
Monday–Friday 8am–5pm  
115 La Posta Road, Suite A, Taos  
[TaosCF.org](http://TaosCF.org)  
Call 575-737-9300 for more info.

## Taos Community Foundation Agency Fund Partners

**Amigos Bravos**  
**Bridges Project for Education**  
**Cathleen Tomlinson Fund (SWIDA)**  
**Community Against Violence**  
**DreamTree Project**  
**Dr. Larry Schreiber, Mountain Home Health and Hospice**  
**Ensueños Y Los Angelitos Development Center**  
**Field Institute of Taos**  
**Friends of Anansi Charter School**

**Friends of the Taos Public Library**  
**Golden Willow Retreat Center**  
**Habitat for Humanity Taos**  
**HEART of Taos**  
**Holy Cross Hospital**  
**Kit Carson Museum**  
**Lama Foundation**  
**Metta Theatre**  
**Music from Angel Fire**  
**Not Forgotten Outreach**

**Rocky Mountain Youth Corps**  
**Shuter Library of Angel Fire**  
**Stray Hearts Animal Shelter**  
**Taos Archaeology Society**  
**Taos Art Museum**  
**Taos Center for the Arts**  
**Taos Elders and Neighbors Together**  
**Taos Historic Museum-Martinez Hacienda**  
**Taos Land Trust**  
**Taos Milagro Rotary Club**

**Taos School of Music**  
**Taos Sports Associates**  
**Taos Whole Community Health**  
**The Paseo Project**  
**Think New Mexico**  
**UNM Taos**  
**UNM Taos Education and Career Center**  
**Youth Heartline**

### 2021 SUCCESS STORIES

**Taos Feeds Taos**  
575-770-0681  
[taosfeeds.taos.org](http://taosfeeds.taos.org)

**Abes Cantina**  
575-776-8643  
[abescantinacocina.com](http://abescantinacocina.com)

**Taos Whole Health**  
sponsored by Nita Van Der Werff  
575-776-7806  
[taoswholehealth.org](http://taoswholehealth.org)

**Enchanted Florist**  
575-758-3030  
[taosflorist.com](http://taosflorist.com)

**Burt & Company CPAs, LLC**  
575-758-3964  
[www.burtcpa.com](http://www.burtcpa.com)

**Taos Academy Charter School**  
575-751-3109  
[taosacademy.org](http://taosacademy.org)

**Centinel Bank of Taos**  
575-758-6700  
[centinelbank.com](http://centinelbank.com)

**Coldwell Banker Mountain Properties Walking Rain Group**  
575-224-6652  
[taos.realestate](http://taos.realestate)

**Dreamcatcher Real Estate**  
575-758-3606  
[taosnewmexico.com](http://taosnewmexico.com)

**Southwest Wellness**  
575-737-8960  
[southwestwellnesscenter.com](http://southwestwellnesscenter.com)

**Northern New Mexico Gas Company**  
575-377-3744  
[northernnewmexicogas.com](http://northernnewmexicogas.com)

**Twirl**  
575-751-1402  
[twirltaos.org](http://twirltaos.org)

**Moreno Valley High School**  
575-377-3100  
[mvhs.com](http://mvhs.com)

**Unicorn School Supply & Stationery**  
575-758-4106  
[unicornschoollsupplies.com](http://unicornschoollsupplies.com)

**Phoenix Mechanical**  
575-758-3027  
[phoenixmechanical.net](http://phoenixmechanical.net)

**Bailey's Chimney**  
575-770-7769  
[baileyschimney.com](http://baileyschimney.com)

**Questa Economic Development Fund sponsored by Chevron**  
575-586-0124  
[facebook.com/Questa-Economic-Development-Fund](http://facebook.com/Questa-Economic-Development-Fund)

**Holy Cross Hospital**  
800-755-6236  
[holycrossmedicalcenter.org](http://holycrossmedicalcenter.org)

**Petree Nursery**  
575-758-3021  
[petreenursery.com](http://petreenursery.com)

**Red River Brewing Company**  
575754-4422  
[redriverbrewing.com](http://redriverbrewing.com)

**Nusenda**  
575-776-2703  
[nusenda.org](http://nusenda.org)

**Mountain Home Health Care**  
575-758-4786  
[mtrhomehealth.com](http://mtrhomehealth.com)

**Creative Framing**  
575-758-3317  
[creativeframingtaos.weebly.com](http://creativeframingtaos.weebly.com)

**Community Against Violence**  
575-751-4824  
[taoscav.org](http://taoscav.org)

**Simms Art Studio**  
575-770-4589  
[simmsarttaos@gmail.com](mailto:simmsarttaos@gmail.com)

**Taos Community Foundation**  
575-737-9300  
[www.taoscf.org](http://www.taoscf.org)

**Taos Pueblo**  
575-999-5399  
[taospueblo.com](http://taospueblo.com)

**Mattress Mary**  
575-758-5885  
[mattressmary.com](http://mattressmary.com)

**Sol Food Market**  
575-776-5765  
[solfoodnm.com](http://solfoodnm.com)

**Ron Larimore**  
575-770-4462  
[ronlarimore.com](http://ronlarimore.com)

**Randall Lumber & Hardware**  
575-758-2271  
[randalltaos.com](http://randalltaos.com)

**Natural Retreats**  
575-758-2052  
[naturalretreats.com](http://naturalretreats.com)

**Taos Municipal Schools**  
575-737-9000  
[taoschools.org](http://taoschools.org)

**Artwares**  
575-758-8850  
[artwaresjewelry.com](http://artwaresjewelry.com)

**Wolfgang's Spa**  
575-758-1857  
[wolfgangspas.com](http://wolfgangspas.com)

**Golden Willow Retreat**  
575-425-3274  
[goldenwillowretreat.com](http://goldenwillowretreat.com)

**Don Brackett & PJ Garoutte**  
575-779-9588

**Taos Center for the Arts**  
575-758-2052  
[tcataos.org](http://tcataos.org)

**Inger Jirby**  
575-758-7333  
[www.ijirby.com](http://www.ijirby.com)

**Insure Taos**  
575-737-9000  
[insuretaos.com](http://insuretaos.com)

**The Canvas and Eye**  
303-514-5151  
[thecanvasandeye.com](http://thecanvasandeye.com)

**Taos Rockers**  
575-758-2326  
[taosrockers.com](http://taosrockers.com)

**Mante's Chow Cart**  
575-758-3632

**Taos Food Coop**  
575-758-3840  
[taosfoodcoop.com](http://taosfoodcoop.com)

**Taos Community Foundation**  
575-737-9300  
[www.taoscf.org](http://www.taoscf.org)

**Tony Whitecrow's Deerskin Art & Western Collectibles**  
575-770-0934  
[tonywhitecrow.com](http://tonywhitecrow.com)

**Wanda Lucero**  
575-737-5433  
[wandalucero.com](http://wandalucero.com)

**Super Groomers**  
575-613-2825  
[facebook.com/supergroomersoftaos](http://facebook.com/supergroomersoftaos)

**UNM Taos**  
575-737-6215  
[taos.unm.edu](http://taos.unm.edu)

**Dan's Carpet Tile & Window Coverings**  
575-758-2420  
[dancarpetandfloors.com](http://dancarpetandfloors.com)

**Taos Living Center**  
575-758-2300  
[taoslivingcenter.com](http://taoslivingcenter.com)