Lunch & Learn About ORCF Charitable Fund Investment April 8

Ocean Reef Community Foundation’s Advised Fund Donors and interested members of the community are invited to a complimentary lunch presentation on new expanded investment options on Monday, April 8 at Carysfort Hall (reservations required).

About 60 Member families already take advantage of our fee-free, named Donor Advised Funds (DAF), and the lunch will include presentations from our Investment Committee and WaterOak Advisors to review recently established investment options and help donors select from the new choices.

New to DAFs?
They provide the equivalent of an instant private foundation without the costs or responsibilities and enable donors to schedule donations for maximum tax advantage and distribute charitable gifts on their own timetable. The Foundation carries out all due diligence, distributes checks in your fund name to IRS qualified charities anywhere in the country, and provides consolidated records of giving.

ORCF's Invested Funds are managed by WaterOak Advisors and overseen by the Foundation Investment Committee, which is chaired by Foundation President Steve Markel and includes Dan Harding, Ken Karl, Tom Schievelbein and Bob Tweedy. Committee members and WaterOak Principal Clarke Lemons will be on hand to answer donor questions in person.

All invested funds benefit from substantially reduced management fees calculated on the balance of the whole of the Foundation's investments (currently a maximum of 29 basis points), while similar offerings such as Schwab Charitable funds in our investment range incur a minimum 0.60% administrative fee.

As in the past, funds which maintain a minimum balance of $50,000+ are eligible to be invested in the same diversified portfolio as the Foundation's own assets. Funds over $100,000 now have a choice of two additional options, one more conservative and one more aggressive. Those over $1 million are eligible for a custom portfolio and rates.

More information on DAFs and investment options is posted at orfound.org and will be available at the April 8 luncheon presentation at noon in the Tarpon Room. Please email foundation@oceanreef.com or call 305-367-4707 to make a reservation.

South Florida Science Center
“Funding from the Ocean Reef Community Foundation changes lives forever. Through our Science Passport program, the South Florida Science Center is able to bring high tech science equipment and experiments directly into the classrooms of the most at-risk youth in Homestead, Florida City and the Upper Keys. We work with children who would never see these concepts and ensure they have equal opportunities to learn and grow. We have seen lives changed and stereotypes broken on who can succeed at science. We thank the Foundation for allowing us to ‘open every mind to science’ and forever changing the course of so many lives.” Kate Arrizza, CEO

Library Corner

The following are recent books added to the shelves of the Cultural Center Library.

FICTION
That Churchill Woman by Stephanie Barron
Look Alive Twenty-Five by Janet Evanovich

OUT OF THE DARK (Orphan X Series)
by Gregg Hurwitz
The Crooked Staircase by Dean Koontz
The Winter Soldier by Daniel Mason
The Silent Patient by Alex Michaelides
Something in the Water by Catherine Steadman

NON-FICTION
Fascism: A Warning by Madeleine Albright
The Big Fella: Babe Ruth and the World He Created by Jane Leavy
A Star is Born: Judy Garland and the Film That Got Away by Lorna Loft

Out of the Dark (Orphan X Series)
by Yurianna Mikolay
Executive Director
Ocean Reef Community Foundation

Spend a little green, give a little green this St. Patrick’s Day!

Completed at Last!
“Magical Reflections at The Point”
Stephen Wood
35.5” x 70” Unframed
Oil on Linen

PROUDLY OFFERING
EXQUISITE FINE JEWELRY & FINE ART

41 Fishing Village Drive at Ocean Reef
Open Monday-Saturday 10am-6pm & Sunday 12pm-5pm 305.367.8001