



Community Giving
FOUNDATION™

Donor Advised Funds



Establishing a **Donor Advised Fund** at the Foundation provides a flexible, tax-efficient, and personalized way for you to support nonprofit organizations in the region or a defined community. You make a charitable gift to establish the fund, receive an immediate tax deduction, and then remain actively involved in suggesting annual grants to the nonprofit(s) of your choice. Grantmaking is done through your recommendations, which can change each year, and Foundation staff is available to help you learn about new nonprofits in the community.

How It Works

- You make a gift to the Foundation of cash, appreciated stocks, real estate, or other assets.
- The Foundation sets up a fund in your family's name.
- You recommend grants from the fund to your favorite nonprofits each year.
- The Foundation takes care of all the administrative details, ensures nonprofits are in good standing, and helps you learn about new organizations in the community.



A Family Approach to Philanthropy

Although Rich and Jean have always supported their community through time, talent, and treasure, the couple wanted to teach their children and grandchildren about the importance of philanthropy. In honor of their 50th wedding anniversary, they established a donor advised fund to create a family legacy that will last forever.

FEES:

Administrative Fee = 1.5%
Investment Fee = 0.41%

SPENDING POLICY:

Spending Policy = 4.5%

(This determines the annual distribution amount to the agency.)

DISTRIBUTION (grant):

Annually during the first quarter, the Foundation will correspond with the fund representative regarding the fund's available distribution.

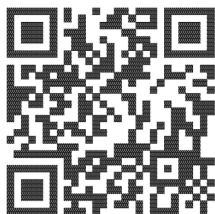
FUND BALANCE:

Donor Advised Funds begin grantmaking when the fund balance reaches \$10,000. But you can start a fund for as little as \$500 with a plan to reach \$10,000 within five years.

Community foundations are made up of **endowment funds**. These permanent funds support community needs in perpetuity (long into the future), not just for one year or even one generation. Endowments are invested and earn money through the stock market, and a certain percentage (spending policy) of the amount is distributed each year in the form of grants back into the community.

Foundation Fundholder Benefits

- Foundation will work with you on publicity to tell your community giving story and promote your new fund.
- An online donation option is created for your fund so your family, friends, and community can help it grow.
- You receive access to the Foundation's Advisor Portal, an online system that gives you access to data about your fund (like donations received, grants awarded, semi-annual fund statements, and other updates).
- Foundation staff stay in communication with fundholders throughout the year and host several events annually to celebrate community giving.



Learn more about creating your giving story. Scan the QR code for our Giving Workbook.

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A Donor Advised Fund is a simple way for you to support multiple nonprofits in your community. The Foundation handles all the administrative details and issues grants in the name of your fund. You can establish a fund today and make grant recommendations now or in the future. You can also involve the next generation in recommending grants from your fund and create a legacy of family philanthropy.



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