

A simple, powerful
and highly personal
approach to giving

Donor Advised Fund



Opening a Donor Advised Fund allows you to make a gift to *your community foundation*, then remain actively involved in suggesting uses for your gift.

Here's how it works:

- You make a gift to your community foundation – you can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive tax benefits the year your gift is made.
- You recommend uses for your fund – working with our professional grantmaking staff to support the agencies and programs you care about most.
- Your recommendations are presented to our community foundation board for approval.
- We handle all the administrative details and issue grant awards to charities in the name of your fund (if you prefer, your awards can be made anonymously).
- If you wish, your gift can be placed in an endowed fund that is carefully invested and can grow over time; a portion of your fund is then used to address community needs every year.

(CONTINUED ON REVERSE)

A personal connection.

When Alex Dorado retired, he wanted a way to give more to his community. "I've lived here my whole life, and now that I have more time and resources, I really look forward to giving back," he says. Alex and his financial advisor met with their community foundation to discuss ways Alex might increase the impact of his giving and gain maximum tax advantage. Alex chose to establish a Donor Advised Fund in his family's name. He now meets with the community foundation's professional program staff to recommend grants in the areas he cares about most. "Last year I used my fund to buy uniforms for an after school sports league, and to support an adult literacy program," reports Alex. "This is a great way to stay involved and use my resources to make a difference in the community I love."



Looking Forward. Giving Back.

Ten Reasons

people choose to give through community foundations

- | | | | |
|--------------|--|--------------|--|
| one | We are a local organization with deep roots in the community | six | We partner with professional advisors to create highly effective approaches to charitable giving |
| two | Our professional program staff has broad expertise regarding community issues and needs | seven | We offer maximum tax advantage under state and federal law |
| three | We provide highly personalized service tailored to each individual's charitable and financial interests | eight | We multiply the impact of gift dollars by pooling them with other gifts and grants |
| four | Our Donor Advised Funds help people invest in the causes they care about most | nine | We build endowment funds that benefit the community forever and help create personal legacies |
| five | We accept a wide variety of assets , and can facilitate even the most complex forms of giving | ten | We are a community leader , convening agencies and coordinating resources to create positive change |

“Community foundations

are a resource that enables people to be charitable in a very personal way.”



DIRK HOFFIUS
ESTATE PLANNING ATTORNEY

Why create a Donor Advised Fund for your family?

It provides a convenient and flexible tool for families who want to be personally involved in suggesting grant awards made possible by their fund. Families with a range of community interests find that it's an ideal vehicle for fulfilling their charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as private foundations).

Plus, a Donor Advised Fund includes these benefits:

- You can establish a charitable legacy in the name of your family.
- Your gift can be combined with other to increase impact in areas you care about most.
- Your family knows that your gift will be carefully invested and managed via our proven stewardship practices.
- You are eligible to receive maximum tax benefits.
- Your gift can generate the long-term advantages of endowment funding -- principal from your gift can be invested, not spent; investment income is then used to make annual grants to nonprofit agencies and programs.
- Your family can establish a fund today, and make grant recommendations now or in the future.
- You can add to your fund at any time, and receive tax benefits with each new gift.

There's so much we'd like you to know. Your community foundation provides personalized service and a variety of giving vehicles. We welcome the opportunity to work with you and your advisor to fulfill your unique charitable objectives.