

Donor Advised Funds

Maximum flexibility and efficiency for giving --

With a Donor-Advised Fund, you can achieve all of your philanthropy wishes, making on-going decisions as changes dictate. This is a permanent endowment that offers you a flexible and efficient way to support the charities, causes and issues that you care about now and in the future.

You can make contributions to your fund at any time and take a tax deduction for the year in which the gift is made. Assets in the fund are pooled and invested with all the Foundation's assets for long-term growth. Each year, a percent of the value of the fund is available for distribution to charities that you recommend.

A Donor Advised Fund may be created by an individual, family, group, business or charitable organization using an opening balance of at least \$15,000.

Consider this:

1. Donor-Advised Funds are a cost-effective and efficient alternative to a private or family foundation. You can review a comparison of a Donor Advised Fund and a Private Foundation.
2. Donor-Advised Funds can be named to recognize the donor(s), a family member, friend or organization. Or, you can select a name for the fund that ensures your anonymity.
3. The foundation can accept contributions of many types of assets, including stock and real estate.
4. You can recommend distributions online through our secure website.
5. Our donor relations staff is available to help you learn more about the charities working in the areas you wish to support.
6. A second generation advisor may be named to make recommendations from the fund into the future.

For more information, you can download a sample [Donor Advised Fund Agreement](#).

