

Pass-Through Funds

A liquid account designed to accommodate current donations and delayed distributions

Working with a Pass-Through Fund allows the flexibility of timing your charitable donations and the decisions of gifting. This fund is like a charitable checking account. You make a lump sum contribution to your Pass-Through Fund at the Burlington Community Fund and recommend multiple distributions over time.

Rather than a permanent endowment fund where assets are pooled and invested, Pass-Through Fund assets are placed in a temporary money market account so you can recommend distributions to the full balance of the fund. Pass-Through Funds can be the solution to your year-end need for additional tax deductions. Let the Burlington Community Fund serve as the back-office for your immediate charitable giving needs. You tell us where you'd like charitable distributions directed, and we handle all the administration.

Consider this:

1. A Pass-Through Fund releases you from the burden of charitable giving paperwork.
2. Financial advisors appreciate the simplicity and ease of Pass-Through Funds to alleviate year-end tax challenges. A Pass-Through Fund can be created in a few minutes.

For more information, you can download the [Pass-Through Fund Agreement](#).