

# Donor Advised Fund

## The gift that keeps on giving

How would you like to make a gift today that would enable you and your family to continue to make charitable gifts in the future?

When you make a gift to us of cash or other assets, we take your tax deductible contribution and establish a special account in your name. Your account is then invested to grow over time, permitting you to recommend annual gifts to your favorite charitable organizations.

## It's like having your own foundation.

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

### How it Works

- Your family makes a gift to the community foundation - you can give cash, appreciated stock, real estate, or other assets.
- You establish a name for your fund  
Your family recommends grants from the fund to support the causes you care about most
- The foundation handles all administrative details and issues the grant to the charity in the name of your fund
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs.
- Your gift - and all future earnings from your gift - is a permanent source of our community capital, helping to do good work, forever.

## It's easy to get started.

Opening a DAF account is easy to do. Simply contact us for a private consultation so we can best understand your giving needs. You can determine a name for your new fund and complete and sign a simple fund agreement.

An initial contribution of \$5,000 or more will establish the fund, which can be accepted in the form of cash, securities, real estate or other assets. Check with us if you have unique or special assets that may be donated in a tax efficient way.

A donor advised fund is a flexible, low cost alternative to a private foundation.

A Donor Advised Fund (DAF) offers you a flexible and easy-to-establish vehicle for charitable giving. Unlike private foundation (PF) gifts, DAF gifts generally qualify for a full fair market value charitable deduction and DAFs have lower startup costs. A DAF also permits you to make grants to charity without the unfavorable PF restrictions and excise taxes.

The Community Foundation of NCW manages over 60 Donor Advised Funds that distribute nearly \$700,000 to cause they care about most in the communities and beyond.



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## Recommending Your Gifts

Once your account is open, you are ready to begin giving!

When you establish a fund at the community foundation, you will receive online access to your fund. You will establish an account with your own private password that can be shared with your family, your financial advisor, or anyone else at your discretion. Your online account enables you to view all fund activity including contribution history, grant requests, and financial statements.

From this account you can also submit a Grant Request to a nonprofit organization, church, or other eligible charity. The foundation receives this request immediately and begins its due diligence process, which includes verifying charitable status and notifying them of your grant recommendation. Through your online account, you will see each step of our process and know when your grant has been awarded.

If you choose not to use the online account, we can provide you with a form that you can email, mail, or deliver to our office at your convenience.

We want your giving experience to provide the joy and reward it deserves!

[Home](#) [Contributions](#) [Grants](#) [Grant Request](#) [Grant Catalog](#) [Statements](#)

### New Grant Request

Grantee

Description

Amount

Anonymous

Grantee Information (if 'Other Grantee' selected above)

Name

Contact

Address

City

State

Zipcode

Phone

Email

[Review](#)

## Your Online Access to Giving is Easy

Simply log in to your online account to make a grant recommendation to any eligible charity. Through our secure online donor portal, you can view your gift history, grant recommendations, and quarterly fund statements - any time, at your convenience.

Not a computer person? No problem. We will work with you to ensure your giving experience is easy and rewarding! Our staff is here to help you over email, phone, or in person at our office.