

Donor Advised Fund

Easy, Flexible 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 open a Donor Advised Fund (DAF), we take your tax-deductible contribution and establish a special account in your name, or any name you choose. You can make grants to any verified charitable organization, anytime you want to fulfill a need in your community or beyond. Your account is pooled with other funds at the foundation and invested to grow over time, so your giving can continue in perpetuity.

How It Works

- You make an initial contribution of \$5,000 or more to the community foundation - you can give cash, appreciated stock, real estate, or other assets.
- You establish a name for your fund.
- You and/or your family recommends grants from the fund to support the charitable 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 fund can be endowed, using 5% of the annual balance from your fund to make grants as the fund exists in perpetuity.
- Your initial gift, future gifts, and earnings from your gift is a permanent source of our community capital, helping to do good work, forever.

Getting 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 with a short visit in our office.

Call (509) 663-7716 or email beth@cfncw.org.

Your initial contribution 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 like having a charitable checking account.

A Donor Advised Fund (DAF) offers a flexible and easy-to-establish vehicle for charitable giving. Unlike a private foundation, DAFs generally qualify for a full fair-market value charitable deduction and have lower startup costs.

A DAF also permits you to make grants to charity without the unfavorable restrictions and excise taxes of private foundations.

The Community Foundation of NCW manages nearly 100 DAFs that distribute over \$1 Million each year.



Donor Advised Fund

Recommending Your Gifts

Once your account is established, you are ready to begin giving! You will receive instructions to create your online account with a secure, private login unique to your fund.

You can view your contribution history, recommend grants to charities, view your grant-giving history, and view statements - all at anytime, at your convenience.

Grants can be requested to support any 501(c)3 public charity, school, church, or government agency. The foundation ensures that the organization is in good standing with the IRS before disbursing the gift.

Pledges you've made or organizations or grants to individuals cannot be fulfilled through your DAF.

If you would like assistance with determining needs in the community, our knowledgeable staff is available to help. You can also use your DAF to support our annual Give NCW campaign for nonprofits or any other funds managed by the foundation.

Your Online Account - A Snapshot

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

Choose Grantee

Grantees you have given to in the past

Other foundation funds

Other Grantee

Name

Address

City

State

Zipcode

Phone

Email

[Use Other Grantee](#)

Giving Through Your Online Account is Easy

Simply log in to your online account from www.cfncw.org to make a Grant Request to any eligible charity. Once you have successfully given a grant through your account, the recipient organization will be included in a drop-down list for easy, one-click giving.

The grant recipient will receive a letter with your fund name and any specific purpose you may want the gift to achieve.

Whether you give to your church, alma mater, PTA, or favorite charitable causes locally and beyond, your online account makes it easy to give with ease and convenience.