

Donor Advised Fund

Easy, Flexible Giving

Do you financially support one or more charities each year? Then you should consider a Donor Advised Fund. Having a Donor Advised Fund is like having a charitable checking account. Once you open the fund, you can use it to support your favorite charities, church, school, or public agency anytime you want to help fulfill a need.

When you open a Donor Advised Fund (DAF), your tax-deductible contribution creates a personal account in your name, or any name you choose. You can access your account online and make grants to verified charities at your convenience. Your account is pooled with other funds at the foundation and invested to grow over time, so you and your family can give *forever*.

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 disburses the grant to the charity in the name of your fund.
- Your fund can be endowed, leaving the principal for investment and using 5% of the annual balance from your fund and ensure it continues in perpetuity.
- Your initial gift, future gifts, and earnings from your fund is a permanent source of our community capital, helping to do good work across the region.

Getting Started

Opening a DAF account is easy to do. Simply contact us for a private consultation so we can best understand your charitable intent. You can determine a name for your new fund and complete a simple fund agreement with a short visit in our office. We can also work with your Professional Advisor to maximize your giving.

Call (509) 663-7716 or email Executive Director Beth Stipe at beth@cfncw.org to make your appointment.

Example of a Donor Advised Fund

John and Jane Smith have been giving to their church, their local theater, and supporting their children's PTA for several years. They were looking for an opportunity to lower their taxes, and their financial advisor suggested a Donor Advised Fund. They made an initial gift of \$10,000 to open the fund and started giving right away. By accessing their fund online, they are able to easily click and give and respond to the needs in their community. Adding tax-deductible gifts to their fund and growth from investment has allowed their giving to increase, and they have also learned about new charities they now enjoy supporting through the activities from the foundation.

The DAF has given them an easy, rewarding way to give back, and they feel more connected to their community. Their gift is also adding to the family of funds that allows the Community Foundation to support hundreds of nonprofits across the region.



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.