

# DESIGNATED FUNDS

*Long-Term Consistent Support*



Perhaps through volunteering, a personal connection or a desire to make a difference, you have developed a passion for specific nonprofit programs and initiatives. No matter what your interest, a Designated Fund ensures ongoing, reliable support for those organizations, and the Foundation will work with you to help establish a fund that achieves your unique charitable goals.

## GETTING STARTED IS EASY.

You can open your Designated Fund with a minimum contribution of \$10,000 and qualify for an immediate income tax deduction. Then, the Foundation will regularly distribute grants on your behalf to the charities you identify when you create your fund.

## IMMEDIATE IMPACT OR ENDURING IMPACT

You can choose to open an *expendable* Designated Fund, allowing you to decide when and how much to give to the organizations you have chosen as long as there is a minimum balance in the account. You can also create an *endowed* Designated Fund, meaning that the funds are invested in perpetuity and a portion of the balance can be granted out each year to your designated organizations – forever.

## CONSIDER A DESIGNATED FUND IF YOU:

- Seek to create a legacy of support for your favorite causes.
- Want to avoid administrative hassles of charitable giving – from keeping receipts for tax records to simply sending a check regularly.
- Want to support specific organizations regularly and in perpetuity.
- Appreciate the efficiency of regular distributions sent by the Sacramento Region Community Foundation to your designated charities.

## KEY BENEFITS

Designated Funds are an ideal choice if you want to ensure consistent support for the nonprofit organizations you care about – during your lifetime and beyond. Key benefits include:

### EASY

Work with our experienced staff to create your own unique fund, and have access to valuable knowledge about area nonprofit organizations. Manage your account and use our online resources at [www.sacregcf.org](http://www.sacregcf.org) to make your giving as effective and efficient as possible. We make supporting your philanthropic passions easy.

### FLEXIBLE

Add to your fund anytime, and have easy online access to your gift and grant history. Our staff can work closely with your financial advisor to help facilitate gifts of many types of assets, including stock and real property.

### PERSONAL

Your fund is just that, your fund. It reflects the causes and organizations you care about in this region and beyond. We're here to offer individualized service and strategies to help you carry out your goals and suggest ways to increase your impact through exclusive donor communications, learning sessions and special events.

### EFFICIENT

The Foundation staff handles all the administrative tasks of achieving your philanthropic goals – from investment options and quarterly statements to advising you on charitable giving – all for a nominal administrative fee to support our work on behalf of the community. The annual fees are 2% for *expendable* funds and 1.5% for *endowed* funds.

## WE'RE HERE TO HELP YOU!

Learn more about the Foundation and Designated Funds by visiting us online at [www.sacregcf.org](http://www.sacregcf.org) or in person at 955 University Avenue, Suite A in Sacramento, or by calling us at 916.921.7723.