

# DONOR ADVISED FUNDS

SIMPLE AND CONVENIENT



The number one option for donors who value freedom, flexibility, and choice, Donor Advised Funds offer a hands-on approach to philanthropy. Donor Advised Funds are ideal for those who plan to give to multiple organizations and programs throughout the year.

The Foundation's role is to support your charitable efforts with personalized service and insight about community needs and organizations. We're here to help you help others through the most effective philanthropy possible. We work with donors from all walks of life who want to improve the community through charitable giving. As the region's most comprehensive philanthropic resource, we are dedicated to increasing the effectiveness of your philanthropy, identifying the greatest needs of nonprofit organizations, and helping strengthen our community.

## GETTING STARTED IS EASY

A Donor Advised Fund is a personalized fund that makes it easy for you to support the causes and organizations you care about locally or across the country. You can use cash, stock, or other assets approved by our board to create a named fund, qualify for an immediate income tax deduction, and when it's convenient for you, choose the charities you want to support. You can open your Donor Advised Fund for as little as \$10,000.

## IMMEDIATE IMPACT OR ENDURING IMPACT

You can choose to open an *expendable* fund, allowing you to decide when and how much to give as long as you maintain a minimum balance of \$500. You can also create an *endowed* fund, meaning that the funds are invested in perpetuity and a portion of the balance can be granted out each year – forever.

## KEY BENEFITS

### 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 access to your fund and grant history 7 days a week, 24 hours a day. The Foundation accepts gifts of many types of assets, including stock and real property. Our staff will work closely with your financial advisor to help facilitate gifts of all types.

### 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.

## CONSIDER A DONOR ADVISED FUND IF YOU:

- Demand simplicity and ease.
- Want to manage all of your giving from one convenient account.
- Want to be actively engaged in your philanthropy.
- Wish to give to multiple organizations and programs throughout the year.
- Are interested in learning more about the regional community and its challenges.
- Want to involve your children or family in your charitable giving.
- Are seeking more information about local giving opportunities, insights, and perspectives.

## WE'RE HERE TO HELP YOU!

Learn more about the Foundation and Donor Advised Funds by emailing [info@lodicf.org](mailto:info@lodicf.org) or by calling (209) 910-3523.