

# DONOR ADVISED FUND

## Hands-On Giving

A Donor Advised Fund (DAF) is a flexible fund that lets you support causes you care about, receive tax benefits, and recommend grants to nonprofits.



## Why Choose a DAF?

**PERSONALIZED** You direct your gift to the causes you care about.

**VERSATILE** Support multiple organizations throughout the year or over time.

**STREAMLINED** The Lodi Community Foundation manages your fund's full-service administration, letting you focus on your philanthropic goals.

**GROWING** DAFs grow over time through investment, multiplying the impact of your original contribution.



## Community Investment Contribution "Fees"\*

### NON-ENDOWED (Flexible & fully spendable)

- 2.00% on portion up to \$3 million or  
\$200 annual fee minimum
- 1.50% on portion between \$3 and \$5 million
- 1.00% on portion over \$5 million

### ENDOWED (Here forever)

- 1.00% on portion up to \$5 million or  
\$100 annual fee minimum
- 0.50% on portion over \$5 million

\*Helps us manage funds responsibly, provide grantmaking support and full-service fund administration, and build the long-term capacity of our community. This covers less than half of LCF's annual operating expenses.



## Ready to Set Up a Fund?

We're here to help you support the causes you care most about. Contact us to establish your Donor Advised Fund and start making a lasting impact in our community!

## Key Features

### FUND MINIMUM

The minimum contribution to establish both an endowed and a non-endowed Donor-Advised Fund is \$10,000. There is no fee to establish a fund.

### TAX DEDUCTION

You are eligible for an immediate tax deduction in the year you donate to your fund.

### ASSET TYPES

A variety of assets can be used to create DAFs at the Lodi Community Foundation, including:

- Cash
- Stock
- Retirement Accounts
- Other assets approved by our board

### RESTRICTIONS

Grants must follow IRS rules and cannot support political activities, personal benefits, or non-charitable purposes.

## Legacy Giving

Donor Advised Funds give your family members access to contribute and help decide where funds go, while inspiring new generations of philanthropists!



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