

## TOOLS FOR GIVING

# Gaining a higher return on your company's charitable investments

Donor Advised Fund



**Opening a Donor Advised Fund** allows your company to make a gift to your community foundation, then remain actively involved in suggesting uses for your gift.

## How it works

- Your company makes a gift to your community foundation—you can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your company's name.
- Your company receives tax benefits in the year your gift is made.
- You (or a team of employees) can recommend uses for the fund—working with our professional program staff to support the causes and organizations you care about most.
- Your recommendations are presented to our community foundation board for approval.
- We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously).
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

## A better approach

TRI, a company with a tradition of giving back, receives many requests for donations. In the past, company president Anthony Hall found it hard to decide which appeals to respond to... and even harder to know if his company's charitable gifts made a difference. Three years ago, the company established a Donor Advised Fund at the local community foundation. Each year, partners add a percentage of profits to the fund. A team of employees from TRI meets with the community foundation to review local needs and recommend grants. Anthony says, "Our company is able to do much more through our community foundation."

## Ten reasons people choose to give through community foundations

### one

We are a local organization with deep roots in the community.

### two

Our professional program staff has broad expertise regarding community issues and needs.

### three

We provide highly personalized service tailored to each individual's charitable and financial interests.

### four

Our funds help people invest in the causes they care about most.

### five

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

### six

We partner with professional advisors to create highly effective approaches to charitable giving.

### seven

We offer maximum tax advantage for most gifts under federal law.

### eight

We multiply the impact of gift dollars by pooling them with other gifts and grants.

### nine

We build endowment funds that benefit the community forever and help create personal legacies.

### ten

We are a community leader, convening agencies and coordinating resources to create positive change.

## More benefits

Donor Advised Funds provide a convenient, flexible way for your business to show it cares about its local community and build awareness about community needs. This type of fund can also strengthen employees' relationships with one another and within the community by providing an enriching, shared giving experience.

A Donor Advised Fund is typically less costly and less time consuming to administer than other forms of philanthropic giving (such as a private foundation), but it still allows you to establish a charitable legacy in the name of your business and fulfill multiple charitable interests.

By working through your community foundation, you can choose to combine your gift with others to increase the impact in areas you or members of your organization care about most, your charitable gift qualifies you for maximum tax advantage under federal law, and you take advantage of the expertise of professional program staff and investment managers. Your business can establish a fund today and make grant recommendations now or in the future.

*Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.*

*You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact your community foundation.*

## For More Information



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