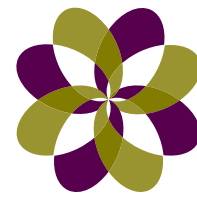


# Donor Advised Funds: Personal, Powerful, Giving



Stanislaus  
Community  
Foundation

## WHAT IS A DONOR ADVISED FUND?

Our most popular and fastest-growing fund type, a Donor Advised Fund allows you to easily support the issues and organizations you care about. You can establish a fund easily and efficiently at Stanislaus Community Foundation using cash, stock or other assets. Then, recommend grants to nonprofit organizations of your choice in Stanislaus County and elsewhere. Grants will be made in the name of your fund, or – if you choose – anonymously. You can claim a charitable tax deduction in the year a gift is made to your fund.

## ADVANTAGES TO A DONOR ADVISED FUND

**PERSONAL.** You can recommend grants to your favorite charities, wherever they are located, at the time of your choosing. An excellent alternative to establishing a private foundation.

**FLEXIBLE** You can add to the fund at any time of your choosing and receive full tax benefits. Stanislaus Community Foundation can accept donations of almost any asset, including stock, crops and property.

**EFFECTIVE.** You receive the maximum tax benefit at the time your contribution to your Donor Advised Fund is made, while retaining the grantmaking privilege for years to come.

**EFFICIENT.** You can easily recommend grants to our staff electronically. Plus, Stanislaus Community Foundation takes care of all administrative tasks, so you can focus on your giving.

**FAST.** Donor Advised Funds can be set up in a matter of hours.

**INFORMED.** Stanislaus Community Foundation program staff is available to help you learn more about nonprofit organizations that meet your charitable goals.

**FAMILY.** You can involve your family at any time and allow them to make grants from the fund in the future.

## KEY FACTS

- Minimum gift to establish a Donor Advised Fund is \$10,000.
- There is no additional fee to establish the Fund, and the nominal administrative fee is inclusive of investment oversight and grantmaking support.
- Funds may be endowed – ensuring grants are made in perpetuity – or expendable, which enables you to make grants of any size at any time.
- Distributions can only be made to qualified nonprofit organizations.

## DONOR ADVISED FUND QUALIFICATIONS

- The IRS prohibits payments to any individual from a Donor Advised Fund.
- Donor Advised Funds cannot be used to grant an individual student a scholarship.
- No expenses – not even for a fundraising events – can be paid from a Donor Advised Fund.



*“Starting our family’s Donor Advised Fund was a simple process that took less than an hour. The Foundation’s staff is always available to answer any questions we may have and they’re also very knowledgeable about what’s happening throughout the county’s charitable sector. Getting involved and opening a fund has shifted the way we think about philanthropy and the long-term impact we can have and the legacy we can leave in our beloved community.”*

**LYNN DICKERSON**  
*Dickerson Family Foundation Fund*