



FUND OVERVIEW

Donor Advised Fund

A donor advised fund through Branch County Community Foundation provides a simple, flexible and tax-efficient way to streamline your charitable giving. You make a gift to establish the fund and then remain actively involved in suggesting grants from the fund to the nonprofit organizations you wish to support. The ease of use and potential tax advantages make donor advised funds the fastest-growing charitable giving vehicle in the nation.

HOW IT WORKS



GIVE TO YOUR FUND



INVEST FOR GROWTH



GRANTS TO NONPROFITS

- Make a gift to the community foundation of cash, appreciated stocks, real estate or other assets.
- We set up a fund in your name, in the name of your family or business or in honor of any person or organization you choose.
- You recommend grants from the fund to your favorite nonprofit organizations.
- You may receive tax benefits in the year your gift is made.
- Our professional staff ensures the nonprofits you wish to support are in good standing.
- Our team is available to help you learn about new organizations doing good work that aligns with your interests in the community.

A PERSONAL CONNECTION

When Alex Dorado retired, he wanted a way to give more to his community. “I’ve lived here my whole life, and now that I have more time and resources, I can give back to a number of causes and organizations that are very special to me,” he said. Alex and his financial advisor met with their community foundation to discuss ways Alex might increase the impact of his giving and gain the maximum tax advantage. Alex chose to establish a donor advised fund in his family’s name. He now meets with the community foundation’s professional staff to recommend grants in the areas he cares about most. “Last year, based on my recommendations, the fund bought uniforms for an after-school sports league and supported an adult literacy program,” Alex said. “This is a great way to stay involved and use what I have to make a difference in the community I love.”



10 REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION

- 1 We are a **local organization** with deep roots in the community.
- 2 We have **broad expertise** regarding community issues and needs.
- 3 We provide highly **personalized service** tailored to each individual's charitable and financial interests.
- 4 Our funds help people **invest in the causes** they care about most.
- 5 We accept a wide **variety of assets** and can facilitate even the most complex forms of giving.
- 6 We partner with **professional advisors** to create highly effective approaches to charitable giving.
- 7 We offer maximum **tax advantages** for most gifts under state and federal law.
- 8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants.
- 9 We build **endowment funds** that benefit the community for decades and help create personal legacies.
- 10 We are a **community leader**, coordinating collaborative resources to create positive change.

FUND OVERVIEW DONOR ADVISED FUND

- 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.

OTHER ADVANTAGES

Donor advised funds offer simplified record keeping. You have one tax receipt for the gift you make to your fund in place of multiple receipts from the nonprofits you support. You can add to the fund at any time and may receive tax benefits with each new gift.

Donor advised funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations). You can establish a fund today and make grant recommendations now or in the future. You also have the ability to involve the next generation in recommending grants from your fund and create a legacy of family philanthropy.

LET'S CONNECT

Contact us to learn more about the ways we can help you have a positive impact on the community and causes you care about.



Branch County Community Foundation
Erica Heminger
(517) 278-4517
erica@brcofoundation.org
<https://www.BrCoFoundation.org>