INSPIRING IDEAS.
IGNITING ACTION.
Establish a Donor-Advised Fund

Some donors want a simple way to optimize their giving; others are experiencing a one-time financial or tax event that calls for making a large charitable gift. Still others crave strategies for making their philanthropy a family venture. Either way, establishing a named Donor-Advised Fund at your Community Foundation – adding to it any time, in any amount – may be a smart choice for you, your family, or your business.

A flexible, disciplined approach

We offer personalized, high-service funds – and you’ll tap into our deep understanding of community investment opportunities, along with our proven philanthropic expertise and research capacity. We work to help our donors feel organized, educated and responsive, rather than reactive. We facilitate family philanthropy, offer ongoing educational events, and provide research and due diligence on grantees.

Fund assets are invested and professionally managed for tax-free growth. Donors may choose one of the foundation’s investment pools (active traditional management, an indexed pool, cash, or a Socially Responsible portfolio), or you have the option to work with your own financial advisor to continue investing charitable assets.

There are no minimum or maximum annual distribution requirements for grants from Donor-Advised Funds. By keeping your fees local, you are investing in the Community Foundation to make grants to local organizations, as well to take the lead solving community-wide issues.
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**THE DONOR-ADVISED FUND**

**GIVE**
and receive a tax deduction

![Stock](stock-icon)
![Cash](cash-icon)
![Other Assets](other-assets-icon)

**GROW**
your charitable dollars by investing

![In One of Our Investment Pools](investment-pools-icon)
![With Your Own Financial Advisor](financial-advisor-icon)

**GRANT**
to your favorite causes at your convenience

![Funding Areas](funding-areas-icon)
![Programs & Initiatives](programs-initiatives-icon)
![Nonprofits](nonprofits-icon)
### INVESTMENT OPTIONS FOR YOUR FUND

<table>
<thead>
<tr>
<th>Pool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BLENDED POOL</strong></td>
<td>Our Blended Pool is invested 75% in index funds, with 25% managed by active managers, split 3:2 between a traditional and a socially responsible focus.</td>
</tr>
<tr>
<td><strong>INDEXED POOL</strong></td>
<td>Our Indexed Pool is all in indexed funds. This pool consists of index funds that reflect the foundation’s asset allocation strategy from our Investment Policy Statement.</td>
</tr>
<tr>
<td><strong>ACTIVE-TRADITIONAL POOL</strong></td>
<td>We offer an Active - Traditional Pool, which will allocate 100% of the fund to be actively managed by our partner. (Minimum balance $50K required)</td>
</tr>
<tr>
<td><strong>ACTIVE-SRI POOL</strong></td>
<td>Donors may also opt to be 100% in a pool that is invested using a socially responsible investment screen.</td>
</tr>
<tr>
<td><strong>CASH POOL</strong></td>
<td>Donors have always had – and continue to have – the option of keeping their funds all in cash, and not invested in the market.</td>
</tr>
<tr>
<td><strong>OUTSIDE FINANCIAL ADVISOR</strong></td>
<td>This program allows your own financial advisor to hold your charitable assets and manage the investment of your fund. (Minimum balance $500K required)</td>
</tr>
</tbody>
</table>

*For more information or to establish a fund, contact us at* Philanthropicservices@commfound.org