



FUND OVERVIEW

Family Donor Advised Fund

A donor advised fund through Four County Community Foundation provides a simple, flexible and tax-efficient way to streamline your family's charitable giving. A gift is made to establish the fund, then your family can work together to suggest grants from the fund to the nonprofit organizations you collectively 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.

SHARING FAMILY VALUES

Sara Lin and her husband Peter chose to establish the Lin Family Donor Advised Fund at their local community foundation. "We wanted to share our community values with our children and share our family values with our community," Sara Lin said. Every year, the Lins and their children meet with community foundation staff to recommend uses of the fund. Two years ago, they recommended that it be used to help start a daycare center in an underserved area. Last year, the fund helped expand the hours of the center, in addition to supporting an area arts camp. "We look forward to a day when we might involve our children's children in giving back," Sara said.



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 FAMILY DONOR ADVISED FUND

- We handle all the administrative details and issue grants to charities in the name of your family's fund (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 provide a way for your family to get involved with the community and make a difference together. This type of fund is typically less costly to administer than other forms of philanthropic giving (such as a private foundation), but it still allows you to establish a charitable legacy in your family's name, fulfill multiple charitable interests and share giving values with the next generation.

By working through your community foundation, you can take advantage of the expertise of our professional program staff and investment managers. Your family can establish a fund today and make grant recommendations now or in the future.

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.



Four County Community Foundation
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