

# A powerful and highly personal approach to giving

## Donor Advised Fund



**A Donor Advised Fund** allows you to make a gift to the Community Foundation of the Great River Bend, then remain actively involved in suggesting uses for your gift.

### How it works

- You make a gift the Community Foundation - you can give cash, appreciated stocks, real estate or other assets.
- We establish a fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive tax benefits the year your gift is made.
- You recommend uses for the fund - working with our professional grantmaking staff to support the agencies and programs you care about most.
- Your recommendations are presented to our Community Foundation Board for approval.
- We handle all of the administrative details, issuing grant awards 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 is a permanent source of community capital, helping to do good work forever.

### **A personal connection.**

*The Kleine family believes they have had many blessings in their lives, so much so, that they feel a responsibility to share them with others. The Kleine's have offered their time and talent by serving on local boards and committees of charitable organizations, and they have supported an array of nonprofit organizations through their Charitable Giving Fund.*



**Community Foundation**

**Great River Bend**



# Donor Advised Fund

## Ten reasons to give through the Community Foundation

### 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.

## Why create a Donor Advised Fund?

It provides a convenient and flexible tool for individuals, families and organizations who want to be personally involved in suggesting grant awards made possible by their fund. People with a range of community interests find that it's an ideal vehicle for fulfilling their charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of charitable giving (such as family or corporate foundations).

### Plus, a Donor Advised Fund includes these benefits:

- You can establish a charitable legacy in your name, in the name of your family or in honor of any individual or organization you select.
- Your gift can be combined with others to increase impact in areas you care about most.
- You know that your gift will be carefully invested and managed via proven stewardship practices.
- You are eligible to receive maximum tax benefits and Iowa taxpayers may also qualify for the 20% Endow Iowa Income Tax Credit.
- If you wish, your gift can generate the long-term advantages of endowment funding - your gift can be invested, not spent, and earnings are used to make annual grants to nonprofit organizations and charitable programs.
- You can establish a fund today and make grant recommendations now or in the future.
- You can add to your fund at any time and receive tax benefits with each new gift.

**For more information on how to establish a Donor Advised Fund, ask your financial advisor or contact the Community Foundation.**

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