

Donor Advised Funds

Build
FOREVER VALUE
with us



THE CATHOLIC
COMMUNITY FOUNDATION
OF SANTA CLARA COUNTY

WHY THE CATHOLIC COMMUNITY FOUNDATION?

You have choices in the administration of a Donor Advised Fund. The Foundation's core value is providing donors the opportunity to generate grants based on our Gospel values and in support of Catholic ministry. Donor Advised Funds with the Foundation can grant to any qualified 501(c)3 as long as the charitable organization engages only in work that aligns with Catholic social teachings. All of the Foundation's funds are managed under United States Conference of Catholic Bishops guidelines for socially responsible investing.

As the repository of grantmaking for the local Catholic Community, we are well equipped to advise you about effective programs and organizations that would benefit from your support.



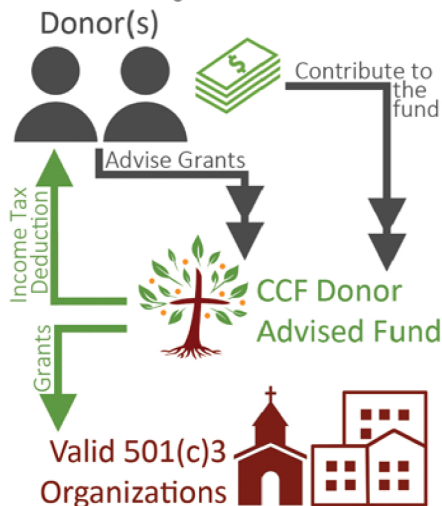
Donor Advised Grants fund vital programs in our community, like health clinics and other services for low income and homeless individuals.

Why choose the Catholic Community Foundation over commercial Donor Advised Funds? Commercial funds lack our focus on a charitable mission. Our funds may have a slightly higher cost, but you will know that the money going to the Foundation enables us to fulfill our mission and positively impacts our local community.

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund (DAF) is a tax advantaged charitable vehicle which allows you to receive the full benefits of your one-time donation in a specific year. There are many benefit of this type of fund. You are able to take your time in deciding where and when to grant your funds. Also, you can clear all your stock donations through the Foundation, vastly simplifying the process of giving stock.

Your fund may advise grants for up to two lifetimes, so it can create a legacy of philanthropy within your family. Your investments will grow tax-free for future grants to charitable causes.



The Catholic Community Foundation holds your funds securely and offers a choice of investment plans to best suit your needs. The Foundation's online portal and knowledgeable staff make it easy to grant to valid 501(c)3 organizations.

You have the option to name your fund after your family, a loved one, or any unique name you choose. There is also always the option to make anonymous grants.

DONOR ADVISED FUND VS. PRIVATE FOUNDATION

What are the benefits of a DAF versus establishing your own Private Foundation?

	Donor Advised Fund	Private Foundation
Cost	One-time set-up fee & small (1%) annual fee	Often requires employing lawyers, accountants and staff, as well as administrative expenses
Administrative Requirements	The Foundation establishes an individual fund in your name. We manage investing, accounting, & state and federal reporting	An individual 501(c)3 organization must be established and requires filing with the IRS for charitable tax exemption status. You are responsible for compliance with federal and state guidelines
Tax Benefits	Charitable deduction of 100% fair market value for most gifts	Charitable deduction is often limited to donor cost. The initial gift is subject to additional federal taxes that DAFs are not
Flexibility	No annual payout requirement so you grant funds at your own pace, whenever you choose	Subject to a 5% minimum annual grant payout
Privacy	You choose if a grant is public or anonymous	Anonymity is not an option

GIFTED DONOR ADVISED FUND

One or various donors can contribute to a Gifted Donor Advised Fund in honor of a recipient. The donors receive a full charitable tax deduction for the year the donation is made. The recipient of the fund (the advisor) chooses how to charitably “spend” or grant the funds later, to eligible non-profits of his or her choice, with no timing or payout restrictions.

A Gifted Donor Advised Fund is a lovely way to commemorate and honor another person with a gift that allows the recipient to affect real change in their community.



*75% of Donor
Advised Grants
through the Foundation
support programs and
organizations in
our county.*

QUICK FACTS

- \$10,000 minimum starting investment
- 1% annual fee
- Individual grant requests must be at least \$250
- We recommend that 25% of grants support local Catholic causes
- Unlimited grants distributed at the donor's recommendation
- Grant checks will be mailed within 30 days of the request
- Donor may grant to non-Catholic organizations that do not go against our Gospel values
- Grant anywhere in the US
- Online portal allows access to fund balances, grant history, gift history, & database of grantees

Set up a Donor
Advised Fund at
the Foundation today!

CONTACT US FOR ASSISTANCE:

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