

IMAGINE...

Building Forever Value



Why the Catholic Community Foundation?

We know you have choices in the administration of a Donor Advised Fund. Our sole vision is to strengthen Catholic ministry through establishing and growing endowed funds.

These could include funds for parishes, Catholic school or the religious. They might also include funds for Catholic fields of interest, such as youth and young adult ministry, education assistance and senior support.

By establishing a Donor Advised Fund with us, you become a partner in the achievement of our vision.

Please join us.

How to get started?

Setting up a Donor Advised Fund is simple.

Contact us at info@cfoscc.org or (408)995-5219 and we will help you through the process. Begin your fund today.



DONOR ADVISED FUNDS

How to Make the Most of Your End of Year Charitable Contributions



THE CATHOLIC
COMMUNITY FOUNDATION
OF SANTA CLARA COUNTY



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COMMUNITY FOUNDATION
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Opening a Donor Advised Fund vs. Establishing a Private Foundation

	Donor Advised Fund	Private Foundation
Cost	Simple one-time set-up fee and small, 1% annual fee.	Often requires employing lawyers, accountants and staff, as well as administrative expenses.
Administrative Requirements	The Foundation will establish an individual fund in your name. We manage investing, accounting and state and federal reporting.	An individual 501(c)3 organization must be established and will require filing with the IRS for charitable tax exemption status. Responsible for compliance with federal and state guidelines.
Tax Benefits	Charitable deduction of 100% fair market value for most gifts of long-term capital gain.	Charitable deduction often limited to donor cost. Subject to additional federal taxes that DAFs are not.
Flexibility	No annual payout requirement. Grant funds at your own pace, whenever you choose.	Subject to a 5% annual grant payout.
Privacy	Choose whether to gift publicly or anonymously.	No anonymity option.

“Jesus teaches us another way: Go out. Go out and share your testimony, go out and interact with your brothers, go out and share, go out and ask. Become the Word in body as well as spirit.”

- Pope Francis

Quick Facts

- Minimum investment: \$10,000
- Set-up fee: 5%
- Annual fee: 1%
- Unlimited grants distributed at donor’s discretion within 30 days of request
- May gift to non-Catholic organizations within our Gospel values
- Provides maximum donor flexibility

Why choose a Donor Advised Fund for your year end charitable giving?

- Gain immediate tax benefits with a one-time charitable donation. Retain flexibility in giving to the causes you love at your own pace.
- In the case of appreciated assets, a Donor Advised Fund can assist you in turning capital gains into charitable gains.
- Grant funds to your parish or another organization over time, directing your giving to the specific programs you choose.
- The Catholic Community Foundation holds your funds securely and offers a choice of investment plans to best suit your needs.