

# Donor Advised Funds



## How Donor Advised Funds Work

### Give

- We can accept a variety of gift types, including cash, stocks or other assets like real estate or land.
- Gifts to your fund are tax deductible.
- You may give to the fund at any time.

### Grow

- Increase your charitable impact by growing the dollars in your fund. You invest the assets in your donor advised fund through your financial advisor or in one of our professionally managed investment pools.
- Assets in your fund grow tax free.

### Grant

- Make distributions from your fund to any of your favorite charities, anywhere and at any time.
- Use our online fund management tool to recommend grants from your fund, make gifts to your fund or research giving opportunities.
- There are no annual minimum grant distribution requirements.

### FINANCIAL FACTS:

- A donor advised fund can be established for \$10,000 or more.
- There is no setup fee or fees associated with closing your fund.
- The administrative fee not only covers the cost of administering your fund; it is also reinvested to support our mission in the local community.

At the Community Foundation  
Tampa Bay you can set up a  
donor advised fund to help  
organize and maximize  
your giving.

# Donor Advised Funds

## Ten Reasons to Give Through Community Foundation Tampa Bay

- We are a local organization with deep roots in the community.
- We have broad expertise on community issues and needs.
- We provide highly personalized service tailored to your charitable and financial interests.
- Our funds help people invest in the causes they care about most.
- We accept a wide variety of assets and can facilitate the most complex forms of giving.
- We partner with professional advisors to create highly effective approaches to charitable giving.
- We offer the maximum tax advantage for most gifts under federal law.
- We multiply the impact of gift dollars by pooling them in professionally managed portfolios.
- We build endowment funds that benefit the community forever and help create personal legacies.
- We are a collaborative community leader, coordinating resources to create positive change.

**Give** to your fund and receive a tax deduction



**Grow** your charitable assets



**Grant** to your favorite charities



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