A Personal Approach to Giving

Do you want to use your charitable dollars to support high-performing nonprofits addressing issues you care passionately about? Would you like to be part of an established, engaged community of philanthropists? If you answered “yes” to either of these questions, then a donor advised fund could be right for you.

WHAT IS A DONOR ADVISED FUND?

Donor advised funds (often called DAFs) are a popular and flexible type of fund. Donors can lock in an immediate tax deduction by contributing to the fund, yet distribute the money, which grows tax-free, to their chosen charity or charities over time. Donors may give grants locally or nationally to any nonprofit that is a registered 501(c)(3) organization.

A DONOR ADVISED FUND IS A WAY TO GIVE THAT IS:

+ **Personal** - Your fund is customized for you. Grants are made in the name of your donor advised fund or, if you choose, anonymously, to nonprofit organizations you recommend – anytime and anywhere.

+ **Flexible** - You can add to your donor advised fund whenever you want. The Community Foundation can accept donations of almost any asset, including stock and real estate, enabling you to benefit from maximum tax advantages.

+ **Efficient** - Consolidate your charitable giving in one fund and have the option of supporting multiple nonprofits. You can easily recommend grants to our staff electronically. Plus, we take care of all the administrative tasks, so you can focus on your giving.

+ **Fast** - A fund can be set up and running as soon as a quick and simple form is completed and assets are gifted to the Community Foundation.

+ **Knowledgeable** - Our professional team is here to offer individualized service and strategies to help you carry out your goals and suggest ways to increase your impact through exclusive donor communications, workshops, site visits and special events.

Starting a donor advised fund at the Community Foundation for Brevard is like having your own private foundation. Even better, you get the fun of philanthropy while we take care of everything else.

A Mother’s Legacy

Marie passed down her passion for philanthropy and ensured her two daughters could build upon their family’s legacy when she set up a donor advised fund through her estate. Since 2008, daughters, Charlotte and Laura connect to make grant recommendations in their mom’s memory.

“It’s been so rewarding to work with the Community Foundation to carry on our mom and dad’s legacy of service—it has continued to connect us in a way we never anticipated. Our parents would be so proud that we continue to impact the causes they so loved. From afar, we have thoroughly enjoyed having an active tie with our hometown through this fund which will live on for generations to come.”

About your Community Foundation

Since 1981 we have provided personalized philanthropic services. Together we have helped individuals, families and businesses contribute $20 million to make positive change in our communities. We hope you will join us.
OPPORTUNITIES:

+ **Year-end tax planning** - Just earned a large bonus, but no time to decide on the most deserving charities? Establish a donor advised fund for an immediate tax deduction, and stay involved in your gift for years to come.

+ **Simple alternative to private foundations** - Thinking about establishing a private foundation, but looking for a better, simpler way? Or, frustrated with the ongoing management of your private foundation? Establish a donor advised fund and stay personally involved with the distribution of gift dollars. Use Community Foundation grant expertise for community knowledge and greater impact.

+ **Strategic giving** - Passionate about meeting a specific community need and want to make a meaningful gift? The Community Foundation has the professional expertise to recommend ways to make the greatest impact.

+ **Sale of a business** - Own highly appreciated stock in a company that is about to be acquired? Structure a charitable gift of stock before the company is sold to reduce capital gains and increase charitable deductions. Establish a donor advised fund so a once-in-a-lifetime event can help you do good, forever.

+ **Closely held stock** - Personal net worth tied up in a closely held company, but want to give back? Donate a portion of company stock to the Community Foundation; company may buy it back for fair market value. Establish a donor advised fund or planned gift; you are eligible for a tax deduction at the fair market value of appreciated stock (less any planned gift value).

+ **Engage your family** - Donor advised funds provide a way to teach children and grandchildren about financial stewardship and philanthropy as it relates to giving back, passing along the joy and values of charitable giving.

+ **Preserving an estate** - Estate planning identifies significant taxes going to the IRS, but you want to keep tax dollars local? Reduce estate taxes through a charitable bequest or other planned gift, and create a personal legacy in the community that stays true to your charitable intent forever.

WHY WORK WITH US?

**Community Foundation for Brevard** provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals. There is so much more we’d like you to know. For more information on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact the Community Foundation for Brevard.