

The Foundation also issues quarterly and year-end statements of your fund's activity.

How Much Must You Contribute to Establish a Fund?

It is strongly suggested that a fund be established with at least \$25,000 in assets.

Can You Set Up a Fund to Be Established After You Pass Away?

Yes. You may designate your Foundation fund as the beneficiary of a bequest of cash, securities, qualified deferred retirement assets, a life insurance policy, a charitable gift annuity or a charitable trust. You also can name a future advisor to make grants from your fund. Our staff can work with you and your estate-planning advisor to review these and other planning options.

Is There a Fee to Establish a Fund?

There is no start-up fee, and the Foundation's low, annual administrative costs mean a higher percentage of the returns on your contributions will remain in your fund to benefit the charities you wish to help in the future.

How Do You Get Started?

Give us a call. We will work with you and your financial or legal advisor to customize a plan that will enhance your charitable goals and offer you significant tax advantages. Call (937) 222-0410 or toll free at (877) 222-0410, and ask to speak to one of our Development officers. You also may visit us online at www.daytonfoundation.org.



THE DAYTON
FOUNDATION

We're here for good.

*The Regional Community
Foundation*

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Meeting All Standards for
U.S. Community Foundations

**Hands-On Giving to Help
You Help Your Favorite
Charities**

Donor-Advised Funds



A highly personal approach to your charitable giving through The Dayton Foundation:

- remain actively involved in grants from your fund
- benefit from the Foundation's 80+ years of experience and proven stewardship practices
- may involve your family in important grantmaking decisions
- give anonymously, if you prefer

What Is a Donor-Advised Fund?

A donor-advised fund through The Dayton Foundation provides a simple, flexible and effective way to fulfill your charitable giving.

You can establish a donor-advised fund today, and recommend grants to the charities of your choice now or in the future. You also can add to your fund at any time and receive tax benefits with each new gift.

When you establish a donor-advised fund through The Dayton Foundation, you benefit from more than 80 years of charitable giving experience, community knowledge and sound investment management practices.

Why Establish a Donor-Advised Fund, Instead of Giving Directly to Individual Charities?

Endowing your gift through a Dayton Foundation fund enables you to provide a source of continual income for your favorite charities. As a well-established community foundation, The Dayton Foundation can safeguard your fund's principle, preserving your charitable gifts and intent.

Plus, establishing a fund through the Foundation opens the door to a wealth of charitable-giving expertise and the flexibility to give assets (such as appreciated stock or real estate) that some smaller organizations might not be able to receive on their own.

How Are Grants Made from Your Fund?

You may submit grant recommendations online through Donor Express, The Dayton Foundation's free, secure, password-protected service, available through our web site (www.daytonfoundation.org). You also may mail your completed grant recommendation request forms to us.

The Foundation reviews your recommendations and, upon approval, issues checks to your chosen charities. You will receive a copy of the letter that is sent to each charity as a confirmation that your grant has been processed.

Can Grants Be Made Outside the Greater Dayton Region?

While it is anticipated that the majority of your grants will be made locally, you may recommend grants to any IRS tax-exempt charitable, educational or religious organization in the United States.

Is There an Annual Distribution Requirement or Minimum Grant Amount?

Although most funds make regular payouts, no minimum grant or annual payout is required with a donor-advised fund through The Dayton Foundation.

Can Your Grants Be Made Anonymously?

Yes. We can make your grants anonymously, if requested, or in the name of your fund.

Can Your Children Advise Grants?

Yes. An advised fund allows you to pass along the value of giving to your family.

You can name family members and others, who are living at the time that the fund is established, to join you in advising current grants or to succeed you as fund advisors.

What Happens When Your Last Fund Advisor Dies or Resigns?

If your fund balance is over \$25,000, we will continue to distribute the income in keeping with your charitable interests in the region. If your fund is valued under \$25,000, the income and principal will be distributed through the Foundation to address the highest and best needs in the community.

How Can an Advised Fund Help You in Your Year-End Tax Planning?

Maybe you have received a large bonus, but don't have time before the end of the year to decide which charities to support. With an advised fund, you receive an immediate tax deduction for your charitable contribution, then you may take as much time as you need in recommending grants to charities.

The convenience and flexibility of an advised fund enables you to make substantial gifts to your fund in profitable years and to sustain the same level of giving to charities in leaner times.

How Do You Stay Informed About Your Fund's Activity?

You may access your fund information, including your balance and deposit and grant history, through Donor Express.