



COMMUNITY FOUNDATION OF LOUISVILLE

DONOR ADVISED FUND

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund is a charitable giving tool that combines maximum tax benefits with the flexibility to support your favorite charitable organizations at any time. You make a tax-deductible contribution to start your fund, the contributions are invested for long-term growth, and you (or your Advisory Committee) recommend grants to the causes you care about most.

GETTING STARTED IS EASY

You can create a named Donor Advised Fund for a minimum of \$25,000 with gifts of cash, stock, or other assets. Rather than tracking numerous gift receipts, you only need one receipt form the Community Foundation for your taxes. The Gift Planning staff at the Community Foundation can help you set up your fund to ensure philanthropic goals will be met.

KEY BENEFITS

Efficient: The Community Foundation organizes and simplifies your giving, handling all administrative tasks – keeping track of your gifts and grants. The Community Foundation of Louisville is a public charity offering maximum tax benefits and fewer administrative burdens than a private foundation.

Personal: Grants from your Donor Advised Fund will reflect the causes you care about most. We're here to help you carry out your philanthropic goals and suggest ways to increase your impact through donor communications, workshops and special events. You may monitor your fund online through the My Fund section of our website.

Flexible: After you establish your Donor Advised Fund, you may add to your fund at any time, and utilize online access to recommend grants from your fund 7 days a week, 24 hours a day.

Legacy: Children and grandchildren can be named to your fund's advisory committee. Years from now, when the advisory committee ends, you will have a fund that supports the causes you care about – forever!

HOW DO I GET STARTED?

It's easy! Just call **502.585.4649** or send an email to **giving@cflouisville.org**. We'll work with you to create a charitable fund that carries out your unique charitable goals.

You can also find more information on the Community Foundation at our website, **www.cflouisville.org**.

CONSIDER A DONOR ADVISED FUND IF YOU:

- Want to maximize your gift
- Seek flexibility to make grants on your own timetable
- Desire to include your family in your philanthropy
- Have the desire to make anonymous gifts
- Want to leave a lasting legacy