Simple, Convenient, Effective:

**Donor Advised Fund**

The number one option for donors who value freedom, flexibility, and who plan to give to multiple organizations and programs throughout the year, a Donor Advised Fund offers a hands-on approach to philanthropy.

**Getting Started Is Easy**

A Donor Advised Fund is a personalized charitable fund that makes it easy for you to support the causes and organizations you care about — locally and across the country. You can use cash, stock, or other assets to establish a named fund, qualify for an immediate income tax deduction, and when you choose, direct grants to nonprofits you wish to support.

You can open your Donor Advised Fund for as little as $10,000. Whether you create an expendable fund (allowing you to decide when and how much to give as long as you maintain a minimum balance of $500) or an endowed fund (investing the funds in perpetuity so a portion can be granted each year), your Donor Advised Fund makes your philanthropy streamlined and rewarding.

**Key Benefits**

**Easy and Flexible:** Work with our expert staff to create your unique charitable fund, which you can access, increase, and make grants from at any time via our online portal. We accept gifts of many types of assets, including stock and real property, and our staff will work closely with you and your financial advisor to facilitate a giving plan that meets your philanthropic goals.

**Personal and Personalized:** Your fund reflects the causes and organizations you care about in this region and beyond. We’re 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, learning sessions, and special events.

**Efficient and Impactful:** Our staff handles all the administrative tasks of achieving your philanthropic goals — from investment options and quarterly statements to advising you on charitable giving — all for a nominal Support Fee. The annual Support Fee is the greater of $250 or 2% of the fund’s balance for expendable funds and 1.5% for endowed funds, which we re-invest into the community through our strategic grantmaking and impact programs, making you a vital partner in our sustained work to strengthen the capital area.

**Consider a Donor Advised Fund if you:**

- Seek simplicity and ease.
- Want to manage all of your giving from one convenient account.
- Want to be actively engaged in your philanthropy.
- Wish to give to multiple causes.
- Aim to involve your children or family in your charitable giving.
- Are interested in learning about the community and its needs.
- Are seeking more information about giving opportunities, insights, and perspectives.

Our mission is to lead, serve, and inspire enduring philanthropy for a just and vibrant Sacramento region.

The center of philanthropy in the area, we are dedicated to increasing the effectiveness of your philanthropy, identifying and addressing our region’s greatest needs, and — together — strengthening local communities. We are here to support your charitable efforts with personalized service. To learn more, visit sacregcf.org or call (916) 921-7723.