

Consistent Support for Specific Causes: Designated Fund

Perhaps through volunteering, a personal connection, or a desire to make a difference, you have developed a passion for specific nonprofit programs and initiatives. No matter what your interest, a Designated Fund ensures ongoing, reliable support for those organizations, and our expert team will work with you to help establish a fund that achieves your unique charitable goals.

Getting Started Is Easy

A Designated Fund is a personalized charitable fund that makes it easy for you to support specific organizations you care about — locally and across the country. You can use cash, stock, or other assets to establish a named fund and qualify for an immediate income tax deduction. Then, the Foundation will automatically distribute annual grants on your behalf to the nonprofits you designate.

You can open a Designated Fund for as little as \$10,000. Whether you create an expendable fund (allowing you to decide how much the Foundation distributes annually as long as the fund maintains a minimum balance of \$500) or an endowed fund (investing the funds in perpetuity, with a portion granted each year), your Designated Fund makes your giving streamlined and rewarding.

Key Benefits

Easy: 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 — during and beyond your lifetime, if you wish. When you open a fund, you have instant access to our team's valuable knowledge about local organizations and a secure, online fund management portal to track your fund's activities.

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 ensuring grants are distributed annually to your designated nonprofits — 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 strategic grantmaking and impact programs, making you a vital partner in our sustained work to strengthen the capital area.

Consider a Designated Fund if you:

- Seek to support your favorite organizations, regularly and in perpetuity.
- Want to avoid administrative hassles of giving — from keeping tax receipts to sending grant checks.
- Appreciate the efficiency of distributions sent by the Foundation to your designated organizations on your behalf.

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.**



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