

Donor-Advised Funds

Flexible and Easy



Opening a donor-advised fund allows you or your family to *make a gift to Community Foundation Santa Cruz County, then remain actively involved in directing your gift to the causes or nonprofit organizations you care about most. A donor-advised fund is a simple, powerful, and highly personal approach to giving.*

How it works:

- You make a tax-deductible gift to Community Foundation Santa Cruz County — you can give cash, stocks, real estate or other assets. The minimum to start a fund is \$25,000. You may add to your fund at any time, receiving tax benefits with each new gift.
- We set up a special fund in your name, in the name of your family or in honor of any person or organization you select. (You may also give anonymously, of course.)
- You recommend grants from your fund at any time via DonorCentral online, or by email, fax or regular mail. Designate your favorite nonprofits or work with our professional staff to target the community needs you care about.
- We handle all the administrative details and issue grants to nonprofits in the name of your fund. You need only to report one charity on your tax return — the Foundation.
- Your fund is expertly invested.
- You receive quarterly statements showing investment performance, fees and grantmaking activity, or choose to view your fund activity online.

Grantmaking Made Simple

In 2008, John and Betty Altman decided to establish a donor-advised fund after years of giving through the Foundation.

“It’s been great,” says John. “We gift stock to our fund, get the tax benefits and help the nonprofits we like to support in the county and beyond.”

Through DonorCentral — an online grantmaking tool for donors with advised funds, giving to a multitude of causes has never been easier.

Make grants from your fund online at anytime. Export reports on your giving and grants history. Check your fund balance, and find out about special projects in need of funding.

A donor-advised fund is a “one-stop shop” for your charitable giving.

Donor Advised Funds

Ten reasons people choose to give through Community Foundation of Santa Cruz County

One

We are a **local organization** with deep roots in the community.

Two

Our professional program staff has **broad expertise** regarding community issues and needs.

Three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

Four

Our funds help people **invest in the causes** they care about most.

Five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

Six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

Seven

We offer maximum **tax advantage** for most gifts under federal law.

Eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

Nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

Ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

Donor-advised funds are convenient, flexible tools for anyone who wants to be personally involved in grantmaking. If you have a range of community interests, a donor-advised fund may be the ideal vehicle for fulfilling your charitable wishes.

More Benefits:

- Donor-advised funds are far less costly and easier to administer than private foundations.
- Save on your income taxes by giving appreciated property instead of cash.
- Use your fund to involve your family in charitable giving. Funds can be structured to last for generations.
- Maintain a steady level of charitable giving despite fluctuating income.
- Choose your level of anonymity, grant by grant.
- The Foundation shields you from unwanted solicitations and mass mailings.
- If you wish, your fund can be endowed. Earnings from your fund are permanent sources of community capital helping to do good work forever.
- Our staff is available to answer your questions or to do research on specific organizations.

**For more information
contact Sam Leask, philanthropic services director
at 831.662.2060 or sleask@cfsc.org.**