

## Donor Advised Fund

A highly personal approach to giving



Creating a Donor Advised Fund lets you make a gift to the Foundation, then remain actively involved in recommending uses of your gift. Donor Advised Funds lets you work closely with the Foundation's staff, who will regularly provide you with information concerning community needs brought to the Foundation, so that you can review those needs and see whether you wish to address any of them with gifts from your Donor Advised Fund. It's a simple, powerful, and highly personal approach to giving.

### How it works

- We work with you to address your charitable and financial intentions.
- We assist in the development of a fund agreement, which establishes the fund, the purpose of the fund and the name of the fund.
- You make a gift to the Parkersburg Area Community Foundation — you can give cash, appreciated stocks, real estate, or other assets.
- You receive tax benefits in the year your gift is made.
- You recommend grants from your fund to support causes and organizations you care most about, within and outside of the Foundation's service area. Our professional program staff will work with you identify community needs that match your charitable interests.
- We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously).
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

### Giving together

Over the years, Jane Burdette has been involved with a wide variety of charitable organizations throughout our community. Several years ago, in order to provide support for important charitable causes, Ms. Burdette established a Donor Advised Fund at the Foundation.

"I have been involved with many community groups and have been able to see worthwhile ideas become reality with Foundation assistance," Ms. Burdette said. Now, she can help to support many important community projects through recommending grants from her Fund. The Donor Advised Fund provides financial support to worthwhile community projects, with special attention to projects that are new, innovative, and creative and those that respond to important community needs.

"In life, all of us are given a torch to carry. It's up to each and every one of us to keep it burning bright as long as we have it and until we turn it over to someone else."

Advised Fund

### Why Give Through the PACF?

**one**

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

**two**

We provide highly personalized services tailored to best fit your financial and charitable interests.

**three**

We offer maximum flexibility and tax advantages to donors.

**four**

We help individuals and families build their legacies.

**five**

We serve as a leader and catalyst of philanthropy.

**six**

We accept a wide variety of charitable gifts and can facilitate complex forms of giving.

**seven**

We have a profound understanding of our community needs and the organizations addressing them.

**eight**

We build endowment funds that benefit the community now and forever.

**nine**

We handle all the administrative details of your donation/fund so you don't have to.

**ten**

We manage and invest your fund thoughtfully with both growth and grants in mind.

### More benefits

Donor Advised Funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grant awards made possible by their gifts. If you have a range of community interests, you may find that it's an ideal vehicle for fulfilling your charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

Your gift can be combined with others to increase its impact, and you can add to the fund you establish at any time, receiving tax benefits with each new gift. You can establish a fund today and make grant recommendations now or in the future. And once your fund is endowed, it becomes a permanent community funding resource.

### Advised Fund Requirements

**Amount to Establish:** \$2,000 non-endowed; \$10,000 endowed (*must achieve endowment within 5 years*)  
When your fund has reached endowment, you have the option to follow the Foundation's Spending Policy or elect to maintain at least \$10,000 in the fund at all times.

**Fees:** When your fund has reached endowment,  
1.0% per year on first \$500,000  
.5% per year on portion \$500,000 - \$1 million  
.25% per year on portion \$1 million - \$3 million  
Flat rate fee available per year on \$3 million+  
Minimum annual fee: \$200

*Fees allow us to implement important community initiatives to solve regional issues and continue to serve our community.*