

Donor Advised Funds

Giving through the Community Foundation

Establishing a donor advised fund with us allows you to make a gift to the Community Foundation and remain active in suggesting uses for your family's gift. Then you can pass that role on to your children or another successor advisor of your choosing. A minimum gift of \$10,000 is required for an *Endowment Fund*; \$1,000 to start a *Future Fund*.

How it works

- Your family makes a gift to the Community Foundation — you can give cash, appreciated stocks, real estate or other assets.
- We set up a special fund in your family's name.
- You receive tax benefits in the year your gift is made.
- Your family recommends uses for the fund, working with our professional donor services staff to support nonprofit causes you care about most.
- Your recommendations are presented to our Board of Directors for approval.
- We handle all the administrative details and issue grants in the name of the fund your family establishes (or anonymously if you prefer).
- Your gift can be placed into an endowed or non-endowed fund that is invested over time. Earnings are used to award grants each year. Your gift — along with all future earnings from your gift — is a permanent source of community capital, helping to do good work forever.

Tim and Joy Neville use their donor advised fund within our Waupaca Area Community Foundation affiliate to support favorite charities, but it serves another function. It's a way to keep their grown children, Eric and Lindsay, connected with the Waupaca community and what it has done for their family.



“We feel a sense of obligation to the community.”

Tim Neville

*Tim and Joy Neville
Family Fund*

For more stories of giving

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