

TOOLS FOR GIVING

A simple, powerful and highly personal approach to giving.

Donor-Advised Funds



Opening a Donor-Advised Fund allows you to make a gift to your Community Foundation, then remain actively involved in recommending ways to use your gift.

Here's How it Works:

- You make a gift to the Community Foundation in the form of cash, appreciated stocks, real estate or other assets.
- The Foundation creates a special fund in your name, in the name of your family or business or in honor of any person you choose.
- You receive tax benefits the year you make your gift.
- You recommend uses for the fund you establish by working with our professional grant making staff to support the agencies and programs you care about the most.
- The Foundation handles all of the administrative details and issues grant awards to charities in the name of the fund you establish. If you prefer, you can make your awards anonymously.
- You can also place your gift in a carefully invested, endowed fund so it can grow over time. A portion of the fund you establish will then help address community needs every year.

Why create a Donor-Advised Fund?

Donor-advised funds provide a convenient and flexible tool for individuals, families, businesses or groups who want to remain personally involved in suggesting grant awards from their fund. People with a range of community interests find this type of fund an ideal vehicle for fulfilling their charitable wishes. Typically, donor-advised funds cost less and are easier to administer than other forms of philanthropic giving, such as family or corporate foundations.

A personal connection.

When Alex Dorado retired, he wanted a way to give more to his community. Alex and his financial advisor met with their community foundation to discuss ways Alex might increase the impact of his giving and gain the maximum tax advantages. Alex chose to establish a donor-advised fund in his family's name. He now meets with the community foundation's program staff to recommend grants in the areas he cares about most. "Last year I recommended that the fund buy uniforms for an after school sports league and support an adult literacy program," said Alex. "What a great way to stay involved and use my resources to make a difference in the community I love."



Community Foundation
of Washington County MD, Inc.

Looking forward...giving back

"Community Foundations are a resource that enables people to be charitable in a very personal way." ~ Dirk Hoffius Estate Planning Attorney

Donor-Advised Fund

Ten Reasons to Give through the Community Foundation of Washington County

1 LOCAL. We are a local organization with deep roots in the community.	6 TAX ADVANTAGES. We offer maximum tax advantage under state and federal law.
2 PROFESSIONAL. Our professional staff has broad expertise regarding community issues and needs.	7 PARTNERS. We partner with professional advisors to create highly effective approaches to charitable giving.
3 PERSONAL. We provide highly personalized service tailored to each individual's charitable and financial interests.	8 MULTIPLIERS. We multiply the impact of gift dollars by pooling them with other gifts and grants.
4 CARING. Our donor-advised funds help people invest in the causes they care about most.	9 BUILDERS. We build endowment funds that benefit the community forever and help create personal legacies.
5 FLEXIBLE. We accept a wide variety of assets, and can facilitate even the most complex forms of giving.	10 LEADERS. We serve as a community leader, convening agencies and coordinating resources to create positive change.

A Donor-Advised Fund includes these Benefits:

- You can establish a charitable legacy in your name, in the name of your family, or in honor of any individual or organization you select.
- You can combine your gift with others to increase impact in areas you care about most.
- We will carefully invest and manage your gift via our proven stewardship practices.
- You have the opportunity to receive maximum tax benefits.
- If you wish, your gift can generate the long-term advantages of endowment funding. The principal from your gift will get invested, not spent. Investment income will then make annual grants to nonprofit agencies and programs.
- You can establish a fund today, and make grant recommendations now or in the future.
- You can add to the fund you establish at any time and receive tax benefits with each new gift.

The Community Foundation of Washington County provides personalized service and a variety of giving vehicles. We welcome the opportunity to work with you and your advisor to fulfill your unique charitable objectives.

Community Foundation of Washington County MD

is a tax-exempt public charity created by and for the people of Washington County, MD. The Foundation exists to promote local philanthropy and since 1997, we have distributed over \$17 million to the community. With over \$35 million in assets and more than 285 funds, donors may contribute to a range of charitable endeavors or set up their own endowed fund to ensure support for generations to come. The Community Foundation has a five-year annualized investment return that makes it one of the top performing community foundations in the country. To learn more about the Foundation or create a fund, please call us at (301) 745-5210 or visit our website at www.cfwcmd.org.



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