

# Seven Benefits of Establishing a Donor Advised Fund

AT FAIRFIELD COUNTY'S COMMUNITY FOUNDATION



When you want to actively participate in your charitable giving, a donor advised fund is ideal. You experience the joys of philanthropy without the drudgery of paperwork and reporting. You can give to any qualified public charity in the United States, including those operating overseas. Your giving becomes more meaningful, effective—and easy.

## Benefits to You

1. You can name your fund.
2. You receive immediate tax benefits, even if you wait to recommend grants from the fund you establish.
3. You, or a fund advisor you designate, are involved with the fund. You make recommendations for grant distributions, and you can consult with our staff to learn about community needs that match your interests.
4. If you establish your fund with \$250,000 or more, you may elect to designate a specific money manager, contingent upon the Foundation's approval of that manager and investment strategy.
5. You are freed from fiscal management and paperwork. We handle all of the administrative responsibilities, including oversight, due diligence, record keeping and reporting.
6. You may give anonymously.
7. You can engage your children and grandchildren, and name them as advisors and successors.

## It's Easy to Begin

- Establish your donor advised fund with an irrevocable, tax-deductible contribution of \$50,000 or more in cash or publicly traded securities.
- You can make grant recommendations of \$500 or more at any time to any qualified public charity. We handle all transaction details.
- You can add to your fund with new contributions at any time.

## IN THEIR OWN WORDS

“The Foundation helps us focus our major giving.

The staff tells us about programs that are in our interest range, particularly those that are less well known yet worthy.

With their expertise as a guide, we're confident our contributions will have a real impact.”

*Peter & Barbara McSpadden  
Riverside*

“When we established the Mellis Family Fund at the Foundation, we looked forward to drawing on its community knowledge and expertise to make our philanthropy more informed and organized.

We wanted to focus on local nonprofits serving children's and families' educational needs, and organizations providing mental health services.

The staff recommends nonprofits aligned with our goals, and suggests partnering opportunities with others who share our interests and focus. The Foundation's advise is always informative, constructive and helpful.”

*Ellen and Joel Mellis  
Stamford*

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