



DONOR ADVISED FUNDS



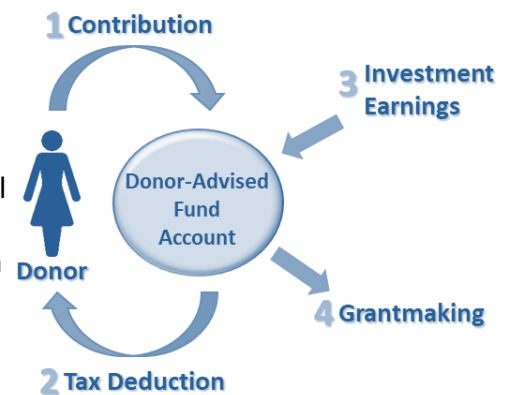
Flexible. Simple. Charitable.

A Donor Advised Fund (DAF) helps individuals and families manage their charitable donations in a simple and easy manner. DAFs are like “charitable checkbooks” because they provide a flexible way for donors to make a charitable contribution, receive an immediate tax deduction for the maximum allowable amount and then recommend grants from the fund to various charitable entities whenever they want. Donors can contribute to their fund as frequently as they like and can even choose to invest their fund and have it potentially grow tax free.



You can...

- Open a DAF with no minimum
- Advise when and where to send grants through a simple online portal
- Spend the fund down to zero or allow it to grow for future gifts
- Grant to any Catholic, pro-life, or social service agency whose mission is in keeping with the teachings of the Catholic Church
- Use your current financial advisor to manage the assets in your DAF



Key benefits

- You receive an immediate tax deduction for the full amount of the contribution to your DAF then you decide over time when and to whom you want to send grants
- Teach charity by naming children as successor advisors to the fund
- Simple process for gifting to charities through an easy-to-use, secure, online portal
- Choice of investment options including using your own financial advisor to manage the assets in your DAF
- Take advantage of the tax strategy known as “charitable bunching” to maximize your tax savings (*see back of this form for details*)
- You can choose to remain anonymous when supporting charities and stay off of mailing lists



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How does a Donor Advised Fund work?



Make a tax-deductible gift



Donate cash or easily transfer appreciated assets (such as stock) to the Donor Advised Fund and avoid having to pay capital gains taxes while maximizing your philanthropic dollars.

Invest & Grow the balance



You decide how to invest the assets in your DAF based on how you intend to use your fund. While you're deciding which organizations to support, your fund can potentially grow tax-free, making available even more money for charities.

Support a Parish, School, Diocese or charity



With the money in your DAF, you can support any Catholic, pro-life or social service agency whose mission and services are in alignment with Catholic teachings and values. You can choose to remain anonymous when you make your grants so you can keep your personal information private and stay off of mailing lists.

Take advantage of “charitable bunching”



Bunching is when you combine multiple years of charitable giving into your DAF in a single year so that you can itemize your tax deductions in that year and take the standard deductions in the following years, thus maximizing your tax savings. You then use your DAF to make all of your charitable donations in the following years.



Scan the QR Code to learn more.

Let's talk

About the Catholic Community Foundation

The Catholic Community Foundation of Southwest Florida began operating in 2004 to help donors create lasting legacies uniquely aligned with their Catholic values and beliefs. The Foundation works with donors to provide long-term support and sustainability to the ministries, programs, and entities about which they care most.

Why the Catholic Community Foundation

The Foundation supports the mission of Christ in the Diocese of Venice and beyond and was created as an independent 501(c)(3) not-for-profit to help safeguard donors' assets and to ensure that donations will always be used in alignment with donors' wishes. The Foundation also invests all donations in Catholic-screened investments in keeping with our Faith.

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