



DONOR SELECTED ADVISOR OPTION



What is the Donor Selected Advisor Option?

The Donor Selected Advisor Option allows an individual or family to make charitable contributions into a Donor Advised Fund (DAF) with the Catholic Community Foundation while maintaining their relationship with their trusted financial advisor. The financial advisor will continue to manage the donated funds, but will be required to invest in a Catholic-screened portfolio or in predetermined funds that comply with the Catholic Community Foundation's Investment Policy. *(This program begins with contributions of \$50,000 or greater.)*

? What makes the Catholic Community Foundation different?

The Catholic Community Foundation (CCF) has a deep insight into the needs of the faith-based community in addition to charitable giving expertise. This unique combination allows the CCF to support the needs of Catholic donors, as well as the Parishes, Schools and ministries of the Diocese of Venice and beyond, in a way that no other foundation can.

? What is the advantage of a Catholic Community Foundation fund over a private foundation?

A Donor Advised Fund (DAF) with the Catholic Community Foundation can be an easier and more efficient solution than a family foundation. Quicker and considerably cheaper to establish, DAFs offer more privacy and better tax advantages than private family foundations—with a reduced financial and administrative burden.

? How does this program benefit me, the advisor?

The Donor Selected Advisor Option benefits everyone involved. Financial advisors can:

- Provide your clients with a philanthropic plan that is as effective, efficient, and rewarding as every other element of the financial and estate plans you facilitate
- Introduce the idea of faith-based giving and investing to your clients while still maintaining your relationship
- Continue to manage the assets contributed by your clients on your firm's investment platform
- Convert non-managed client assets, such as real estate, personal property, and art into charitable dollars that you will manage
- Offer clients a value-added service by connecting them to some of the best charitable giving products and services on the market



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? Can the Foundation help me/my clients donate complex assets?

Yes, charitable giving encompasses more than just cash donations. You and your clients can utilize our expertise to quickly and easily donate complex assets, such as:

- Gifts of appreciated assets—stocks, mutual funds, etc.
- Gifts of real estate—personal property, commercial property, farmland, or undeveloped property
- Gifts of personal property
- Life insurance policies

? Can the Foundation help with “charitable bunching” and how does it work?

Yes, the Foundation is a great option for your clients when it comes to the tax strategy known as “charitable bunching.” Charitable bunching is when you contribute multiple years of charitable giving into a Donor Advised Fund (DAF) in a single year so that you can itemize your tax deductions in that year and then take the standard deduction 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.

? How can the Foundation fit into my clients estate plans?

The Foundation can work closely with you and/or your clients to help facilitate planned gifts of all types though your client’s estate plans.

? Will I have to pay a fee to work with the Foundation?

No, you will not pay a fee to work with the Catholic Community Foundation .

? How do I get my clients started?

Contact Michael Morse at (941) 441-1124 or morse@dioceseofvenice.org.



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.