DONOR-ADVISED FUNDS

DESIGNATED FUNDS

SCHOLARSHIP FUNDS

NONPROFIT ENDOWMENT FUNDS

PRIVATE FOUNDATION ALTERNATIVE FUNDS

CORPORATE PHILANTHROPY FUNDS

FIELD OF INTEREST FUNDS

Charitable Giving Accounts

AT THE FOUNDATION FOR DELAWARE COUNTY

FOLLOW A PASSION

Through a Field of Interest Fund, donors can support specific areas of interest they define. The Foundation will make grants to the most appropriate and effective organizations within that focus.

WHAT ARE THE BENEFITS OF A FIELD OF INTEREST FUND?

EASY
Work with our experienced staff to create your unique fund, and have access to our deep knowledge about area nonprofit organizations. Avoid the administrative hassles of charitable giving—from having to keep tax receipts to sending a check regularly.

FLEXIBLE
You can add to your fund anytime and have access to your fund 24 hours a day with our easy-to-use online portal. The Foundation can accept gifts of many types of assets, including stock and real property. Our staff will work closely with you and your financial advisor to help facilitate gifts of all types.

PERSONAL
Your fund is just that, your fund. It reflects the causes and organizations you care about—in Delaware County and beyond. We offer individualized services and strategies to help you achieve your goals and suggest ways to increase your impact through exclusive donor communications and special events.

EFFICIENT
The Foundation handles all the administrative tasks of achieving your philanthropic goals—from investment options and keeping track of your gifts and grants to sending you quarterly statements of activity—all for a nominal administrative fee.

Consider a Field of Interest Fund if you:

- **Have a specific philanthropic interest area, such as the arts, education, or the environment.**
- **Want to learn more about other nonprofit organizations in our community offering programs and initiatives in your chosen field of interest.**
- **Believe in the research and community evaluation processes of the Foundation to determine the needs and effectiveness of nonprofit programs.**

WHAT ARE THE TAX ADVANTAGES OF A FIELD OF INTEREST FUND?

- Receive the maximum income tax deduction available in the year the contribution is made.
- Unlike a donor-advised fund, donations from an IRA can be used to satisfy the Required Minimum Distributions (RMD) in the form of a Qualified Charitable Contribution to your field of interest fund.
- Give complex or unusual assets at fair market value (e.g., real estate, closely-held stock).
- Reduce estate taxes with testamentary gifts.
- Avoid capital gains taxes while realizing the maximum tax deductibility of a donation with a gift of appreciated stock, real estate, or complex assets.

HOW DOES A FIELD OF INTEREST FUND WORK?

- Donor establishes the fund with an initial contribution and selects the field of interest they want to support.
- Expert program staff identify organizations in the donor's selected field of interest where the money will have the most significant impact.
- The Foundation distributes grants from the fund to eligible nonprofits.
- You receive updates on the impact your gift is making in the community.

WHAT ARE THE MINIMUMS AND FEES?

A Field of Interest Fund may be opened with as little as $1,000 ($10,000 is necessary to begin granting).

Your Fund is assessed an annual administrative fee of 1%. Minimum fee is $250.

The ability for your contribution to be invested and grow tax-free is a key benefit of a charitable giving fund with the Foundation. Annual investment management fees paid to the investment management firm are variable (0.6- 0.7%).

More of an impact: At commercial institutions, fees generated from charitable giving funds become revenue that can be used at the firm's discretion and primarily benefits stockholders. At the Foundation, fees fund donor services like tax reporting and grant due diligence, but they also help fund the work that enables our communities to thrive: community convenings, strategic grantmaking, donor connections, facilitated dialogues, and nonprofit training.

WHY GIVE THROUGH THE FOUNDATION?

- We are a local organization with deep roots in the community. We don't have shareholders. All of our dollars go back into helping our local community.
- We have broad expertise regarding community issues and needs.
- We provide highly personalized service tailored to your charitable and financial interests.
- You can add to your fund anytime and have access to your fund 24 hours a day with our easy-to-use online portal.
- We connect you with a community of philanthropists through special events, site tours, and programs.
- Our giving options are easy, flexible, and efficient. We accept a wide variety of assets and can facilitate even the most complex forms of giving.
- We can partner with your tax and estate advisors to create highly efficient approaches for your charitable giving.
- Our funds are pooled in order to maximize the impact of investment opportunities - large investment funds benefit from investment opportunities not available to smaller investors.
- We can place your assets into an endowment fund that is invested over time. Earnings from your fund are used to make grants addressing the issues you care about.

THE FOUNDATION FOR DELAWARE COUNTY

We are more than just a platform for charitable funds; we're at the center of a community movement. The Foundation empowers individuals, families, and businesses to maximize their philanthropic potential. We are a catalyst for smarter philanthropy - not just donations, but strategic investments in our shared future.

The exponential power of collective action has transformed the Foundation into one of the largest philanthropic engines in the region. Each year, we distribute more than $2 million dollars in grants to dozens of nonprofits and community groups that provide vital services and resources for our neighborhoods.

Our work stretches beyond financial assistance. We support local nonprofit organizations by providing skill-building events, training, and resources for staff and board members. We provide forums for funders, government officials, and nonprofit leaders to converge, learn, and foster a dynamic, interconnected community that works together.

Our connection to the communities we serve isn't distant or abstract; it's deep and personal. Our public health programs directly impact thousands of individuals each year, allowing us to both offer essential services and gain a true understanding of community needs.

Join us. Together, we can shape a future where compassion fuels change, where collective generosity amplifies impact, and where we, as one community, empower lives and redefine the landscape of philanthropy.

THE FOUNDATION FOR DELAWARE COUNTY

Visit us online at delcofoundation.org or in person at
200 East State Street, Suite 304, Media, PA 19063.

Learn more about the ways we can help you have a positive impact on the community and the causes you care about.

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