

DONOR-ADVISED
FUNDS

SCHOLARSHIP
FUNDS

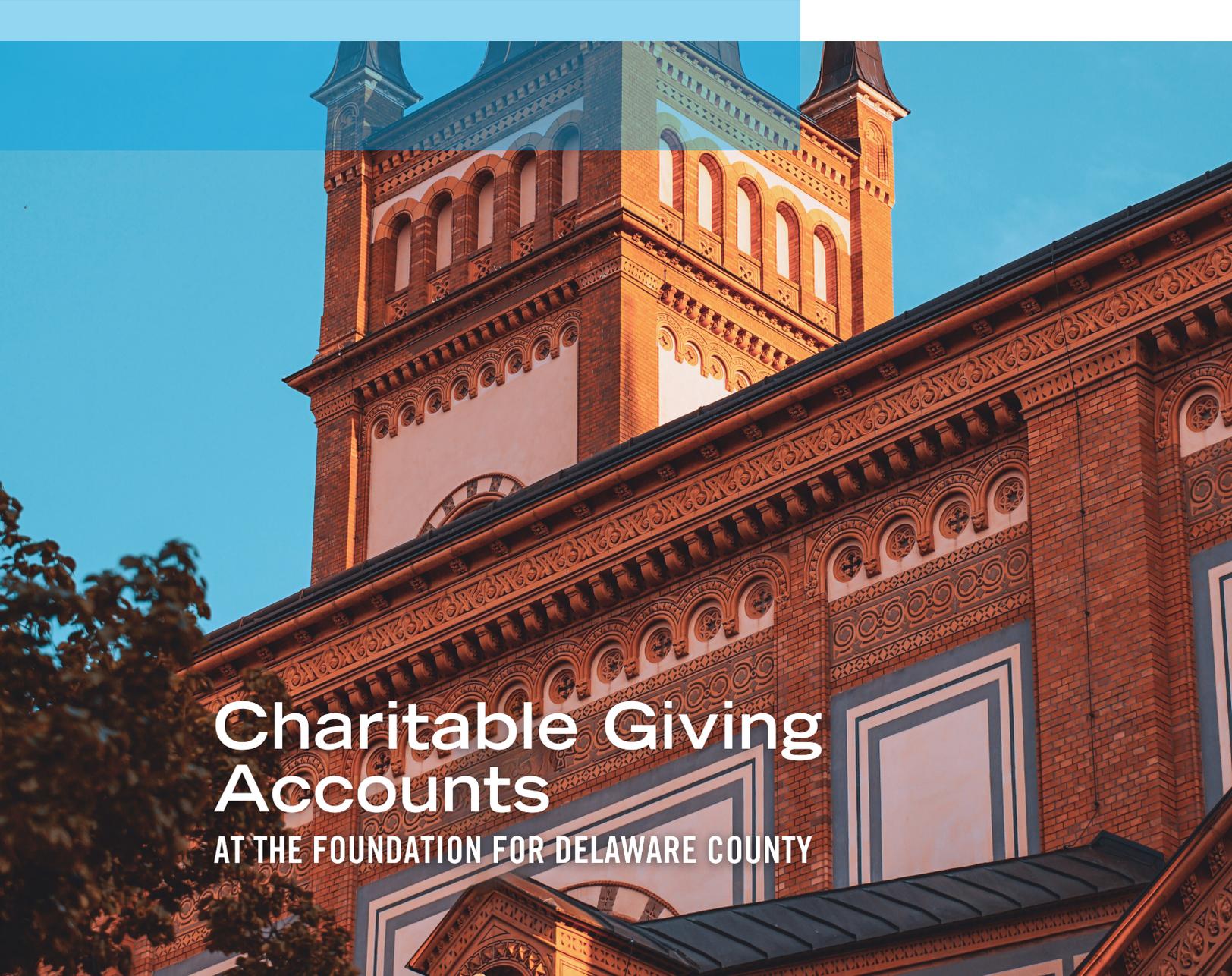
FIELD OF
INTEREST
FUNDS

NONPROFIT
ENDOWMENT
FUNDS

PRIVATE
FOUNDATION
ALTERNATIVE
FUNDS

CORPORATE
PHILANTHROPY
FUNDS

DESIGNATED FUNDS



Charitable Giving
Accounts

AT THE FOUNDATION FOR DELAWARE COUNTY

LONG-TERM CONSISTENT SUPPORT

Through volunteering, support of annual fund drives, your alma mater, or personal interest, you may have developed a passion for specific nonprofit programs or initiatives.

WHAT ARE THE BENEFITS OF A DESIGNATED FUND?

- A low-cost giving vehicle that is easy to establish.
- Administrative convenience: The Foundation handles all the administrative details and tax forms, and issues grants to the nonprofit(s) named in your fund. You have one tax receipt instead of multiple receipts from the nonprofit(s) you support.
- Add to the fund at any time. If the organization you select ceases to exist or changes in mission, the fund can be redirected so that it continues to address your charitable intent.
- Your fund is just that, your fund. It reflects the causes and organizations you care about— in Delaware County and beyond.
- Opportunity to name the fund after yourself or in honor of family, a friend, or an organization (e.g., the Bob Ross Charitable Fund).
- You have the option to give anonymously.
- Your gift can be placed into an endowment fund that is invested over time. Earnings from your fund are used to make grants to the organization of your choice forever.

At a Glance

Designated Funds are an ideal choice if you:

- Want to leave a legacy by endowing your gifts to a specific nonprofit organization.
- Want to avoid the administrative hassles of charitable giving, such as having to keep tax receipts or sending a check regularly.
- Minimum to establish: \$1,000 (\$10,000 is necessary to begin granting).

WHAT ARE THE TAX ADVANTAGES OF A DESIGNATED FUND?

- Receive the maximum income tax deduction available in the year the contribution is made.
- Donations from IRAs may be used to satisfy the Required Minimum Distributions (RMD) in the form of a Qualified Charitable Contribution to your designated fund.
- Avoid estate taxes on gifts to your fund at the Foundation.
- 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 DESIGNATED FUND WORK?

- You (the donor) identify the organization(s) that you wish to benefit.
- You make a gift to the Foundation. You may give cash, appreciated stocks, real estate, or other assets.
- The Foundation sets up a special fund in your name or on behalf of the nonprofit organization(s) you choose.
- You receive tax benefits in the year your gift is made.
- The Foundation issues grants to the designated nonprofit organization(s) according to your schedule.
- We handle all administrative details, including managing specific qualifications you may establish for grant disbursements.

WHAT ARE THE MINIMUMS AND FEES?

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

Your Designated 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 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 our dollars go back into helping our local community.
- We provide highly personalized service tailored to your charitable and financial interests.
- 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 connect you with a community of philanthropists through special events, site tours, and programs.
- 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.
- Your gift (and all future earnings) is a permanent source of philanthropic capital, helping to do good work forever.



Photo by Rick Davis

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.



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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