



CORPORATE *Advised Funds*

Creating a Corporate Advised Fund at the Community Foundation is an easy way for your company to give back to our community through the causes important to you

A Corporate Advised Fund is a fund that allows companies to invest money into an account that is dedicated exclusively to charitable giving which ultimately makes a difference in their community. These funds are sometimes also referred to as corporate charitable funds or corporate foundations.

ADVANTAGES OF A CORPORATE ADVISED FUND INCLUDE:

- ✔ **EASY TO GET STARTED** - Starting a Corporate Advised Fund is as easy as signing a fund agreement and send it with your initial deposit
- ✔ **SIMPLIFY THE GIVING PROCESS** - the Community Foundation can handle all or part your company's philanthropy program depending on how you want it structured
- ✔ **FUND GROWTH IS TAX-FREE** - All growth on your Corporate Advised Fund is completely tax-free
- ✔ **MODEST FEES** - We charge an annual management fee of 1% or less based upon the fund's balance
- ✔ **TAX ADVANTAGES** - A Corporate Advised Fund provides maximum allowable tax advantages for donations
- ✔ **ABILITY TO GRANT ANONYMOUSLY** - Your company make grants in the company's name or anonymously

HOW THE COMMUNITY FOUNDATION CAN HELP YOU

- We assist you in customizing your philanthropic giving program
- We listen to your philanthropic goals, collaborate & connect you to community resources that would support your corporate giving
- We can identify and evaluate prospective grantees
- We maintain all grant record keeping
- We provide monthly financial reports to keep you informed on your fund's activity

GET STARTED TODAY

We can help you get your fund started today so your company can make an impact tomorrow. For more information on creating a Corporate Advised Fund, contact us at (352) 622-5020. Let's get started today!



Building A Stronger Community... ONE PASSION AT A TIME