











# DONOR *Advised Funds*

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

A Donor Advised Fund is a flexible charitable account that enables donors to receive an immediate tax benefit for their contributions. Those contributions are then invested for tax free growth until the donor is ready to recommend grants to a nonprofit agency. Many refer to this as a charitable investment account.

## ADVANTAGES OF A DONOR ADVISED FUND INCLUDE:

-  **EASY TO GET STARTED** - Starting a donor-advised fund is very simple. The minimum amount to open one is \$5,000. To start, you only need to sign a fund agreement and send it with your money or appreciated securities.
-  **SIMPLIFIED RECORDKEEPING** - We make it easy to grant from your fund. You recommend a grant to a nonprofit and we handle the rest.
-  **AVOID CAPITAL GAINS TAXES ON APPRECIATED SECURITIES** - You can donate your appreciated asset to your fund, avoid the capital gains taxes, and receive the market value for your donation to the fund.
-  **MODEST FEES** - We charge an annual management fee of 1% or less based upon the fund's balance.
-  **FUND GROWTH IS TAX FREE** - All growth in your Donor Advised Fund is completely tax-free (not just tax-deferred like your 401k).
-  **WE HELP YOU FIND THE RIGHT CAUSES** - The Community Foundation staff deals with nonprofit organizations every day at the Nonprofit Resource Center. We are happy to supply as much (or as little) advice, guidance, assistance, support, and help as is requested.
-  **USE THE FUND TO MAKE A DIFFERENCE IN PERPETUITY** - You can designate who should take over the responsibility of recommending future grants. You can also specify what types of charitable institutions and/or interests the Community Foundation should fund with your assets in the future.
-  **ABILITY TO DISTRIBUTE FUNDS ANONYMOUSLY** - If you would like your contributions to be given to charities anonymously, the Community Foundation will carry out your wishes.

## GET STARTED TODAY

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



**COMMUNITY FOUNDATION**  
*Ocala/Marion County*

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