



Simplify your charitable giving! With a donor advised fund at CFGC, you can focus on giving the way you want when you want. Partner with us and join a larger community of givers in making your philanthropic hopes a reality and maximizing your impact.

## BY THE NUMBERS

CFGC holds 150 Donor Advised Funds, contributing more than \$10 million in annual giving.

## BENEFITS THAT GO BEYOND GIVING

Access to expert Foundation staff to discuss grants and their impacts, as well as potential future grants.

Educational sessions with other DAF advisors.

Updates on the impacts of your funds and personalized giving opportunities.

A succession plan: exploring how future generations can become advisors to the fund, so your gift keeps giving to the children, creating a legacy of philanthropy.

Fund supervision by a dedicated team who cares deeply for the interests and priorities of our donors.

**A Donor Advised Fund (DAF) is a highly personalized, incredibly flexible mini-foundation, managed under our expert guidance.**

A wide range of assets can be given—from property to stock, real estate, closely held shares, LLPs, or LLC interests. As the fund holder, you recommend grants to qualified charities and then our administrative staff handles all of the details.

The fund may be named after you, in honor or memory of someone you love, or after a cause that is important to you.

Grants may be given to any qualified charity here in Chattanooga or anywhere in the United States.

Tax benefits are significant based on your adjusted gross income. Your grant funds grow according to our investment strategies, so you can give more (tax free).

When you contribute through your DAF to Field of Interest funds, your gift creates a permanent asset for the causes you care about and may be added to the gifts of other Chattanoogaans for even greater impact.

## Start a fund today

A DAF is easy to start—with a gift, or assets, or by converting a private family foundation. We'll work with you to navigate any complexities and create the fund that best suits your priorities.



- 1. Connectivity** As one of the largest grant making foundations in the region, and an expert in community knowledge, we can share with you our professional insight into particular causes or organizations. We will research charitable opportunities that fit your interests and solicit proposals on your behalf.
- 2. Flexibility** You can give to your DAF in a variety of ways including closely held shares, LLPs, real estate or LLC Interests. Your philanthropic advisor will work with you to explore various giving options and find the right pathway to advancing your charitable goals.
- 3. Simplicity** One gift, one receipt. The Community Foundation issues a gift acknowledgment to you for tax purposes. We keep up to date records of all gifts made to your fund and by your fund and provide you quarterly updates or per request. Having us take care of all the paperwork, frees you up to focus on your philanthropic vision.
- 4. Family** Want to engage other family members in your philanthropy? Annual family meetings are beautiful ways to pass along values and enhance relationships. We work with families to promote giving among family members and create a governance structure that fits your goals.
- 5. Anonymity** Want to support particular causes, but without your name being publicized? With a donor advised fund, you can make gifts with complete anonymity and without concern that you will appear in internet searches or reporting.
- 6. Community** When you create a DAF at the Community Foundation, you join a larger collective of generous individuals and companies committed to making a difference in our city. We can connect you to peers that share your interests and passions and leverage your gifts with others to have an even greater impact in the community.
- 7. Sustainability** By setting fund growth as a priority in accordance with the foundation's spending policy, you can provide for the long-term sustainability of your fund and philanthropic vision. Additionally, our staff can work with you to create a planned giving vehicle that meets your needs and ensures the longevity of the causes you care about.
- 8. Savings** When you give long-term capital gain property to a donor advised fund, you avoid capital gains tax on appreciation. Instead, you receive a charitable deduction for the fair market value.
- 9. Ease** Tired of managing a private or family foundation? It's easy to convert the foundation into a donor advised fund at the Community Foundation—so you can focus on philanthropy!
- 10. Legacy** You can create DAFs for individual children, family, or friends—or for a group of them, and they will be able to suggest grants to charities. You can even name a donor advised fund at the Community Foundation as the beneficiary of a retirement account, will or Charitable Remainder or Lead Trust, to create a legacy of giving.