

# What are the Benefits of a Donor-Advised Fund?

## BENEFITS

### Simplicity

- Brings strategy and structure to your giving
- Eases administration of your charitable giving for you
- Keeping records is simpler with one tax receipt

### Flexibility

- Allows you and your family to stay personally involved in grantmaking
- Incur fewer administrative burdens, greater flexibility and tax benefits than setting up a private foundation
- Invest with more than 1,000 other component funds and more than \$1 billion in assets to grow your ability to give
- Ability to give a wide, diverse range of assets

### Maximum Impact

- Leverage CFT's expert staff and community knowledge
- Benefit from CFT's nonprofit due diligence
- Use the CFT Giving Guide as a resource for making gifts to local nonprofits for targeted projects

## OPENING A FUND: THREE EASY STEPS

1. **Talk** with CFT staff to outline charitable interests and terms of your fund
2. **Select** a name and investment option for your fund
3. **Give** a tax-deductible charitable donation to your fund and begin granting to worthy nonprofits

## GRANTMAKING: HOW IT WORKS

