

What are the Benefits of a Donor-Advised Fund?

BENEFITS

Simple

- Bring strategy and structure to giving
- Use CFT staff to support your charitable giving goals
- Receive one tax receipt

Flexible

- Stay personally involved in grantmaking
- Incur fewer administrative burdens, greater flexibility and tax benefits than setting up a private foundation
- Invest with more than 1000 other component funds and more than \$1 billion in assets
- Donate diverse types of assets

Maximum Impact

- Leverage CFT community experts who review more than 3,000 nonprofit grants annually
- Benefit from due diligence conducted on nonprofits
- Use the Giving Guide, 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 the fund and begin granting to worthy nonprofits

GRANTMAKING: HOW IT WORKS

