



MINNESOTA COMMUNITY FOUNDATION



THE SAINT PAUL FOUNDATION

Discover the Flexibility and Advantages of a Donor Advised Fund

Make a lasting contribution to the charitable causes, places and communities you cherish. By creating a Donor Advised Fund with Minnesota Community Foundation or The Saint Paul Foundation, you will receive:

- Tax benefits, including a charitable deduction every time you make a gift to your fund
- Strong investment options and fund management services
- Deep community and philanthropic expertise
- Customized donor services
- Options for recognition or anonymity
- Ability to involve your family as advisors
- Time to focus on the issues and projects you want to support

Donor Advised Funds offer a simple and flexible way for you to make a difference in your community while consolidating your charitable giving. You can gain satisfaction from playing an active role in making gifts to charitable projects and organizations that are important to you. Minnesota Community Foundation and The Saint Paul Foundation provide expertise and support to help you engage in thoughtful grantmaking to projects that make a difference.

A Donor Advised Fund allows you to set aside money and recommend grants to the charitable organizations of your choice. While contributions to your fund are irrevocable, you or others you designate can recommend the charitable causes you would like to support. You can recommend grants at any time during the year in writing, by fax or by e-mail, with a minimum grant of \$250. Our role is to help you shape your philanthropic vision by providing charitable gift planning expertise and careful management of your fund.

Some donor advisors know exactly how they want to use their fund and regularly make recommendations to the Foundation. Other donors tap the expertise of Foundation staff to help determine where gifts are best used in conjunction with their interests. Our knowledge and involvement in the community allow us to act as a vital link between you and the issues and organizations you care about most.

For more information on starting a philanthropic program, please contact the Development Office at 651.224.5463 or 800.875.6167

Fulfill Your Philanthropic Vision While Enriching Lives and Communities

Donor Advised Funds allow you to organize your philanthropy professionally and inexpensively so that more of your money goes directly to the causes you want to support.

The Donor Advised Fund: A simple way to fulfill your philanthropic goals.

The individual donor makes an irrevocable gift of assets* and receives immediate tax benefits.

** Private and restricted securities, real estate and other assets can be gifts.*

Assets are placed in a named fund, custom-designed for the donor. Donor recommends investment options.

Donor recommends grants to public charities at any time.

Flexibility and Ease

Are you making several gifts to charities throughout the year? A Donor Advised Fund provides a way for donors to organize charitable giving including annual donations. It is extremely flexible and easy to manage. You make one gift to the Foundation, receive your charitable deduction at that time, and then direct grants to organizations you normally support on an annual basis. Setting up a fund like this saves you time and effort.

Promote Generations of Giving

By involving your family, your Donor Advised Fund will establish a lasting tradition of philanthropy. If you wish, you may name successor advisors – family members or trusted friends – to continue making grant recommendations after your death. When there are no longer any living advisors, you may also designate specific charities or charitable causes to continue receiving annual grants in your name forever. By allowing successive generations to participate in the decision making, a Donor Advised Fund provides an excellent opportunity to create a legacy of philanthropy within your family.

An Alternative to Starting a Private Foundation

One significant advantage to establishing a Donor Advised Fund is that contributions receive the highest tax benefits allowable by law. Because Donor Advised Funds are managed by Minnesota Community Foundation and The Saint Paul Foundation, they are not subject to all the laws and limitations of private foundations. In addition, the Foundations manage the accounting, legal and investment services so you can focus on philanthropy.



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651.224.0571 Toll Free 800.875.6160
www.mncommunityfoundation.org

The Saint Paul Foundation
651.224.5463 Toll Free 800.875.6167
www.saintpaulfoundation.org

55 Fifth Street East, Suite 600, Saint Paul, Minnesota 55101-1797