

DONOR-ADVISED FUNDS: MAXIMIZE YOUR PHILANTHROPIC IMPACT



A streamlined, cost-effective alternative to private foundations for your charitable giving

Triangle Community Foundation donor-advised funds are a cost-effective and efficient alternative to private foundations for charitable giving.

Donor-advised funds offer a convenient way to manage and boost the impact of giving, allowing you to improve your philanthropic presence, strategy, and efficiency.

Families or companies can make gifts of many types of assets, identify causes to support, recommend grants, and establish a charitable program - all while the Foundation handles the burden of administration.

The Foundation also strives to make it easy to convert your private foundation. Our dedicated team of experts will provide highly personalized support and guidance every step of the way.

Let us help you amplify the power of charitable giving, and ensure the greatest impact for the community.

Contact us today for more information:

800 Park Offices Dr., Suite 201, Research Triangle Park, NC 27709

919.474.8370 | email: donorservices@trianglecf.org
<https://trianglecf.org>

Donor-advised funds offer significant advantages to private foundations.

Facilitate family or corporate philanthropy with an easy, cost-effective solution.

Establish a fund with as little as \$10,000, using any variety of asset types.

Avoid the legal and compliance requirements of a private foundation, including start-up costs, annual filing requirements, governance, and annual minimum payouts.

Leverage the Foundation for fund management, reporting, and grantmaking services.

Grow the fund over time through a variety of diverse investment options.

Manage the fund and recommend grants to nonprofits through our online portal, making giving easy and convenient.

Make grants anonymously, if desired, and avoid the detailed public disclosures of a private foundation, which often generate unsolicited charitable requests.

Name the fund to retain your philanthropic recognition, as desired.

Common reasons for converting a private foundation to a donor-advised fund:



Management and reporting has become too demanding

Burden of keeping up with government regulations

Difficulty meeting the annual payout requirement

High costs of maintaining the private foundation

Preference for anonymity

Seeking additional grantmaking expertise

Aspiration to focus on philanthropy, rather than administration

Converting a private foundation is easy*:

- 1 - Board passes resolution to terminate private foundation
- 2 - Assets distributed to a public charity
- 3 - Terminate private foundation pursuant to state law*
- 4 - File form 990-PF