



DONOR-ADVISED FUNDS

You are passionate about our community, and we are, too. Whether you want to organize and focus your giving, support a specific cause, work together to help make the Triangle region thrive for future generations, provide scholarships for students, or roll up your sleeves and get involved, Triangle Community Foundation is here to help.

Interested in a Donor-Advised Fund?

Donor-advised funds allow you to support the causes you care about, and teach future generations about the importance of giving back. These funds are an efficient and meaningful vehicle for your philanthropy, and provide a great way to be actively involved in deciding what causes and organizations will receive your support. They operate much like private foundations – except there is no mandated five percent distribution, and the Foundation handles all administrative details from record-keeping to accounting, investment, and grant-making activities. A Donor-advised fund allows you to give your cash or marketable securities at a time that is advantageous for tax purposes, allowing you to decide what you would like to support at your convenience.

QUICK FACTS

- Minimum Initial Gift: \$10,000
- Fund Balance to Maintain: \$10,000
- Additional Gifts: Any Size
- Minimum Grant: \$250
- Annual Administrative Fee: 1% first \$1 million, \$300 minimum annual fee
- Time to set up fund: Less than one week

Questions? Contact our Donor Development staff at 919.474.8370.

ADVANTAGES

- Quick and easy set-up with no start-up fees
- Highest level of tax benefits
- Complex gifts accepted
- Anonymity and multi-generational options
- Unlimited grants to publicly-supported charities
- Secure online account access
- Access to staff expertise on community issues, needs, and programs
- Access to fundholder-only events at the Foundation
- Opportunities to co-invest with other fundholders on donor led initiatives

HOW IT WORKS



Give

Make a tax-deductible, irrevocable gift of \$10,000 or more to open a fund.



Grow

Invest the fund using diversified pools managed by specialized investment managers.



Connect

Work closely with our expert staff and learn with other donors to make greater impact.



Grant

Recommend grants to nonprofits and make a difference.

YOUR PHILANTHROPIC PARTNER

- The Foundation manages more than **500** donor-advised funds, from **\$10,000** to more than **\$15 million**
- Grants can be made to organizations in the Triangle, across the state, and throughout the US. We are proud that 73% of our grants stay local
- We offer **four** investment portfolios designed to **grow** the fund

Triangle Community Foundation inspires and mobilizes giving, leadership, and action. By working together with donors and nonprofits to address critical community issues, we envision a vibrant Triangle that ensures everyone thrives. Since 1983, the Foundation has been committed to this work, and with the help of our generous family of donors, each year we grant over \$25 million back into the community to make a difference.