



# 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. 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.

## How it Works:



### Give

Make an irrevocable contribution of \$10,000 to open a non-endowed fund, or \$50,000 to open an endowed 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.

## 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

## Quick Facts

- Minimum Initial Gift: \$10,000
- Fund Balance to Maintain: \$10,000
- Additional Gifts: Any Size
- Minimum Grant: \$250
- Annual Administrative Fee: 1% of the first \$1 million, \$300 minimum annual fee
- Time to set up fund: Less than one week
- Grants can be made to organizations in the Triangle, across the state, and throughout the US
- We offer four investment portfolios designed to grow the fund

## Questions?

Contact our Development Team

919.474.8370 or [development@trianglecf.org](mailto:development@trianglecf.org)

[www.trianglecf.org](http://www.trianglecf.org)