



YOUR GIVING. YOUR IMPACT.

DONOR-ADVISED FUND OFFERINGS



**TRIANGLE
COMMUNITY
FOUNDATION**

Who We Are

We call the Triangle region home, and with over 40 years of experience connecting donors and nonprofits, developing partnerships, and funding solutions to the region's most pressing needs, Triangle Community Foundation works to ensure that everyone who lives here has the resources and opportunity to thrive.



Founded in 1983 with an initial gift of \$1,000 from Dr. George Hitchings, in 2026, the Foundation manages over \$350M in assets, stewards over 800 philanthropic funds, ranging in size and donor-driven initiatives, and partners with our donors, investing more than \$30M each year to support nonprofit organizations and provide scholarships for students.

The Foundation focuses its grantmaking on research-based impact areas:

**Economic
Resilience**



**Environmental
Resilience**



Cultural Arts



**Education &
Youth**



**Capacity
Building**



By partnering with us, you gain access to deep local expertise, trusted nonprofit relationships, and a team dedicated to making your charitable giving as effective as possible. We take the time to:

- Understand what matters to you
- Connect you with opportunities to make a difference in ways that feel personal and impactful
- Handle the details so you can focus on what inspired you to give in the first place

A Thoughtful, Tax-Wise Solution

Donor-Advised Funds at Triangle Community Foundation

Donor-advised funds (DAFs) at the Foundation are designed to allow you to support the causes you care about, and teach future generations about the importance of giving back. These funds allow you to give your cash or marketable securities at a time that is tax advantageous, allowing you to decide what you would like to support at your convenience.

Plus, you can:

- Grow your charitable giving assets tax-free by choosing an invested fund
- Easily track contributions in one place
- Access reports and accounting of your charitable giving in a centralized online portal
- Grant from your fund as often as you like
- Build a strategy for your philanthropic giving, including multi-year recurring or episodic cadences

Give. Grow. Connect. Grant.



With three distinct offerings to support your giving at the level and manner you prefer and may be accustomed to, a Triangle Community Foundation DAF puts all the tools at your fingertips to be thoughtful about supporting causes you care about. Concierge service from a dedicated relationship manager on the Foundation's team means you:

- Get advice about achieving your philanthropic priorities
- Centralize your giving of all types from cash to complex assets
- Rely on thorough nonprofit due diligence
- Organize your contributions



Interested in a **SIGNATURE FUND?**

Signature funds are donor-advised funds that 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 in the Triangle, across the state, and throughout the United States
- 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
- Four investment portfolios designed to grow the fund



Interested in a **GENESIS FUND?**

Genesis funds are donor-advised funds that offer an option to individuals under 50 to partner with the Foundation at a lower fund minimum. 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. A non-endowed Genesis fund provides a pathway over a three-year period to meet the fund minimum, and is a great option to join a community of fundholders beginning their strategic philanthropy while also building a connection to the Foundation.

How it Works:



Give

Make an irrevocable contribution of \$1,000 to open a non-endowed fund.



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 options
- Unlimited grants to publicly-supported charities in the Triangle, across the state, and throughout the United States
- Secure online account access
- Access to staff expertise on community issues, needs, and programs
- Access to fundholder-only events at the Foundation including quarterly gatherings
- Opportunities to co-invest with other fundholders on donor-led initiatives

Quick Facts

- Minimum Initial Gift: \$1,000 to open; \$5,000 min at three years
- Fund Balance to Maintain: \$5,000; \$10,000 max
- Additional Gifts: Any Size
- Minimum Grant: \$250
- Annual Administrative Fee: \$300
- Time to set up fund: Less than one week
- Non-endowed



Interested in a **VISIONARY FUND?**

Visionary funds provide our most robust level of donor-advised fund service, created for individuals and families seeking a distinctive, relationship-driven approach to philanthropy with exceptional stewardship of their charitable resources. Paired with dedicated philanthropic guidance and concierge support, these funds provide a framework for managing your charitable giving with intention, flexibility, and long-term impact. By contributing at a strategically advantageous time, you can maximize tax benefits while maintaining the freedom to recommend grants as opportunities and priorities emerge.

How it Works:



Give

Make an irrevocable contribution of \$1,000,000 to open a non-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 in the Triangle, across the state, and throughout the United States
- Secure online account access
- Access to fundholder-only events at the Foundation including quarterly gatherings
- Opportunities to co-invest with other fundholders on donor-led initiatives
- Specialized philanthropic advisory services including assigned senior staff expertise

Quick Facts

- Minimum Initial Gift: \$1,000,000
- Fund Balance to Maintain: \$1,000,000
- Additional Gifts: Any Size
- Encouraged Grant: \$50,000/year
- Annual Administrative Fee: 1.25% of the first \$1,000,000; tiered
- Time to set up fund: Less than one week
- Four investment portfolios designed to grow the fund

FINDING THE RIGHT FUND FOR YOU



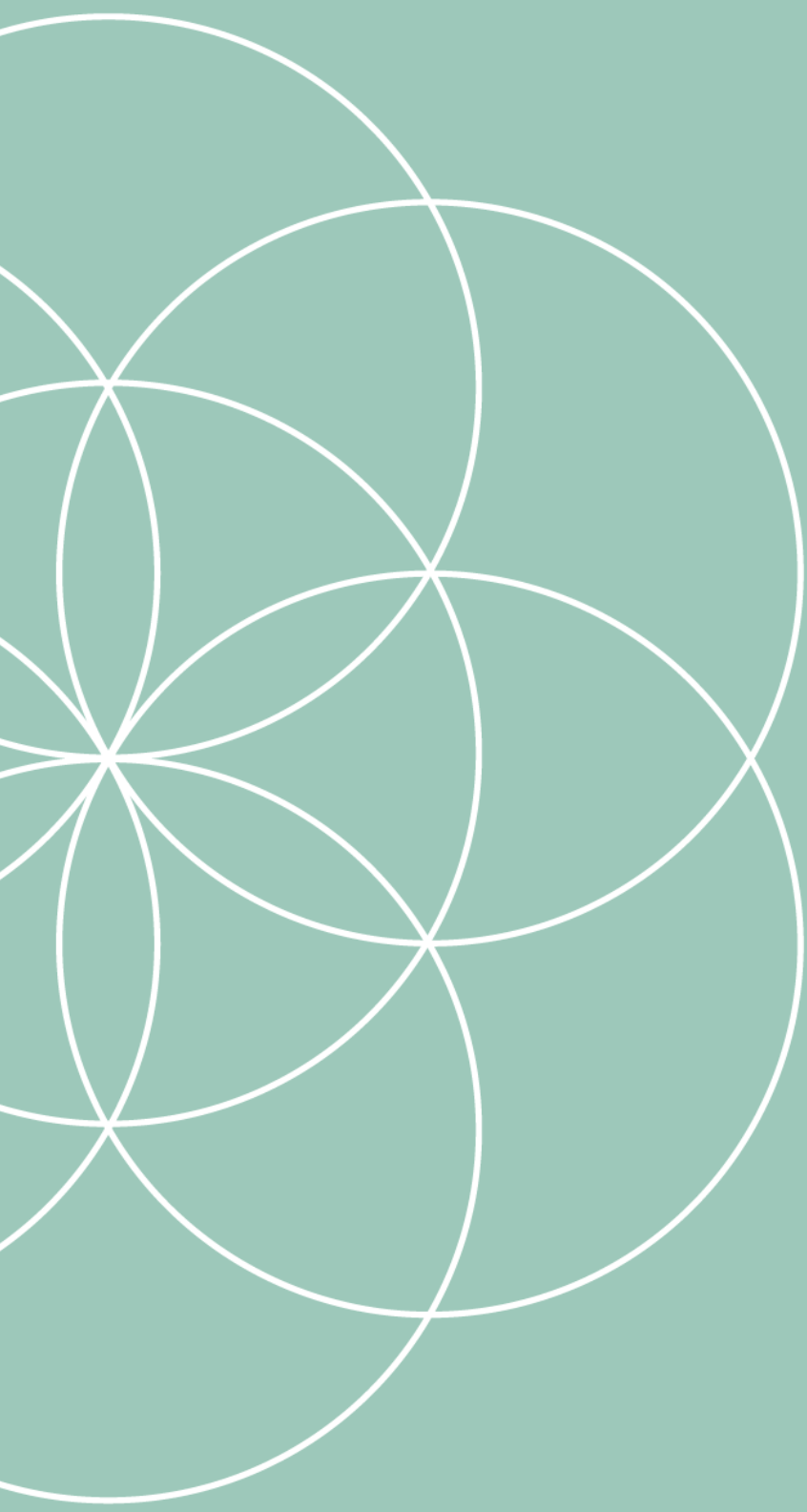
	Genesis	Signature	Visionary
Opening Balance	\$1,000 at open, \$5,000 min by three years	\$10,000 non-endowed, \$50,000 endowed	\$1,000,000 to open
Encouraged to Grant	One per year; \$250	Once per year; \$250	Once per year; \$50,000 min
Minimum Grant Size	\$250	\$250	\$250
Endowed or Non-Endowed Offered	Non-endowed	Both	Both
Annual Fee	\$300	1% of first \$1,000,000 or \$300 min	1.25% of first \$1,000,000 [tiered after]

A TRUSTED PARTNER IN PHILANTHROPY

“ We chose the Foundation because its core values and focus areas are aligned with what we find most important, such as education and youth, environmental conservation, and cultural arts. The staff does an excellent job of identifying and vetting nonprofits we might consider donating to. Additionally, we enjoy the in-person events, meeting with and learning more about local nonprofits face-to-face as well as other like-minded donors - it takes a village to build a community.

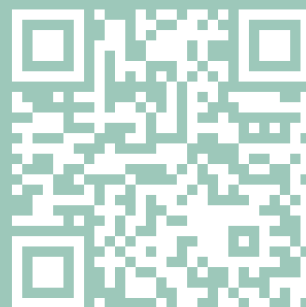


-Bernard Hsu, Fundholder



*Let us help you find the
right option on your
philanthropic journey.*

TRIANGLE
COMMUNITY
FOUNDATION



trianglecf.org