



THE  
CATHOLIC  
FOUNDATION

## Guide to Donor Advised Funds

### *Getting Started*

1. Families or Individuals can start a Donor Advised Fund with a simple letter of agreement, which can be completed in minutes.
2. An initial contribution of at least \$5,000 in cash, marketable securities or other assets are all we ask to open the fund, and you can make additional contributions at any time. You receive immediate tax benefits from your contributions.
3. The Catholic Foundation handles all administrative responsibilities, giving you more time to focus on your charitable giving, the ability to remain anonymous and more simplified tax record-keeping.
4. Consider naming your children as successor advisors to the fund, giving them the right to make grant recommendations after you are no longer able.
5. Choose from a variety of investment allocations for your fund to better serve your charitable goals. All funds are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.

### *Making Grant Recommendations from your Donor Advised Fund*

1. Recommend grants for your selected charities on your own schedule with the convenience of DonorCentral®, which offers the ability to make grant recommendations online.
2. You can choose to support a specific organization such as a Catholic parish, school, or social service organization within the United States, or you can support ministries within a general field of interest such as vocations, marriage and family life, faith enrichment, or elder care.
3. Each grant recommendation is reviewed in detail by our Vice President of Grants & Diocesan Partnerships, to ensure that the beneficiary follows Catholic doctrine.
4. Donation requests are processed regularly, meaning you can respond to emergency situations or to new charitable opportunities that arise.
5. The Catholic Foundation staff offers complimentary guidance and consultation on how to give more strategically and how to magnify the impact of your giving.

**Prayerfully consider a Donor Advised Fund with The Catholic Foundation. Together, we can spread the Light of Christ and make a difference in the lives of many, for generations to come.**