



THE CATHOLIC  
FOUNDATION

## DONOR ADVISED FUND

### Flexible. Simple. Charitable.

Giving becomes convenient and personal with a Donor Advised Fund (DAF), which offers a hands-on approach to philanthropy. This fund invests your charitable gift to grow tax-free for future giving. A Donor Advised Fund allows you the opportunity to make contributions to multiple Catholic or public organizations. Donor Advised Funds are one of our most popular funds because it is flexible and manageable from one simple account. It's your "Charitable Checkbook".



#### You can...

- Open a DAF with a one-time, minimum gift of \$5,000
- Advise when and where to send distributions as small as \$50
- Spend the fund down to zero or grow for future gifts
- Grant to multiple organizations



#### Key benefits

- The Catholic Foundation's administrative fee is 75 basis points, or three quarters of one percent on an annual basis. This is the only fee/cost to you
- Immediate tax deduction with the option of deferred charitable distribution
- Teach charity by naming children as successor advisors to the fund
- Simple, online, 24/7 access to fund details, statements, and gifting
- The Catholic Foundation ensures compliance on your behalf with DAF rules and regulations as mandated by the IRS
- Do all of your giving including the Bishop's Annual Appeal and your weekly parish offertory
- Learn about the needs of other organizations and how you can provide support
- Choice of investment option



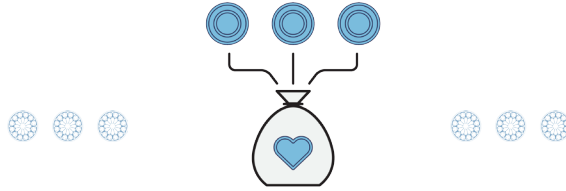


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## How does a Donor Advised Fund work?



MAKE A GIFT TO YOUR DAF



SUPPORT A SCHOOL, PARISH, CHARITY



GROW THE BALANCE

### Make a gift



Donate cash, non-publicly traded assets, or easily transfer appreciated stock to the donor advised fund and avoid having to pay capital gains taxes while maximizing your philanthropic dollars.

### Support a school, parish, or charity



You can support any 501(c)(3) organization with money in your Donor Advised Fund. The Catholic Foundation will ensure peace of mind that grantees are in alignment with Catholic teachings and values.

### Grow the balance



While you're deciding which organizations to support, your donation can potentially grow in investment, making available even more money for charities. Additionally, the balance can grow a Legacy gift upon death.



## Let's talk

#### About Us

The Catholic Foundation's mission is to inspire giving and assist donors to provide for the long-term needs of the 23-county Diocese of Columbus. The Catholic Foundation is one of the oldest and largest Catholic foundations in the country, distributing nearly \$150 million throughout the diocese since 1985.

#### Why Us

The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.

