



An exciting opportunity for your clients:

# DONOR ADVISED FUND MATCH

Your clients' "charitable checking account" for creating **FOREVER VALUE**

**The Catholic Community Foundation is excited to offer a match for Donor Advised Funds until Dec 2018!**

When your client contributes a minimum of \$10,000, their parish will automatically receive an unrestricted donation of \$500 from the Foundation *and* their DAF will receive a 5% match up to \$5,000.

## Not Just for Catholic Donors

*While we are a Catholic Foundation, our DAF holders can grant to non-Catholic organizations across the nation. All donors receive the 5% matching money when they start a fund with us!*

## How the Match Works

Open a Donor Advised Fund with a minimum of \$10,000



Your parish receives a one-time \$500 unrestricted grant



Your fund receives a 5% match up to \$5,000

For more information, contact the Foundation at 408.995.5219 or visit [cfoscc.org/DAF-match](http://cfoscc.org/DAF-match)

## Why the Catholic Community Foundation?

Our core value is in providing donors the opportunity to advise grants in their key areas of interest. Commercial funds lack our focus on a charitable mission; all fees on our DAFs further the Foundation's mission and the impact that we have on our local community.

As the repository of grantmaking for the local Catholic Community, we are well equipped to advise your clients' about effective programs and organizations that would benefit from their support.



### **Why Talk to Your Clients about DAFs?**

Donor Advised Funds are often a great way to start the conversation about philanthropy.

DAFs have great tax benefits, but they also open the door to discussing your clients' philanthropic goals now and as part of their legacy.

Our DAFs may advise grants for up to two lifetimes, creating a legacy of philanthropy within a family. The investments will grow tax-free for future grants to charitable causes.

## Quick Facts

- Donor may grant to non-Catholic 501(c)3 organizations that do not go against Catholic social teaching
- \$10,000 minimum starting investment
- 1% annual fee
- All funds are managed under USCCB guidelines for socially responsible investing
- We accept stock and other complex gifts which simplifies donations to smaller organizations

***A DAF is not an addition to your clients' normal charitable giving, but rather a more convenient, tax-advantaged vehicle for giving to all the organizations they love.***

For more about DAFs, visit [cfoscc.org/what-we-do/donor-advised-funds](http://cfoscc.org/what-we-do/donor-advised-funds)