

DONOR ADVISED FUND MATCH

Your “charitable checking account” for creating **FOREVER VALUE**

The Opportunity

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

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

DAF as Teaching Tool

Some donors use their DAF to teach their children about social consciousness, an idea we call “Kitchen Table Philanthropy.” Parents and children decide – as a family – the charitable organizations to which they will donate that year.

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

What is a Donor Advised Fund (DAF)?

A Donor Advised Fund is like a “charitable checking account”



A donor opens a fund with a minimum of \$10,000 and receives the full tax benefit in the year the gift is made. The donor is now able to take his or her time in deciding where and when to grant this money.

A fund 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.

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 an active grantmaker to the local Catholic Community, we are well equipped to advise you about effective programs and organizations that would benefit from your support.

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 your donations to smaller organizations

A DAF is not an addition to your normal charitable giving, but rather a more convenient vehicle for giving to all the organizations you love.