

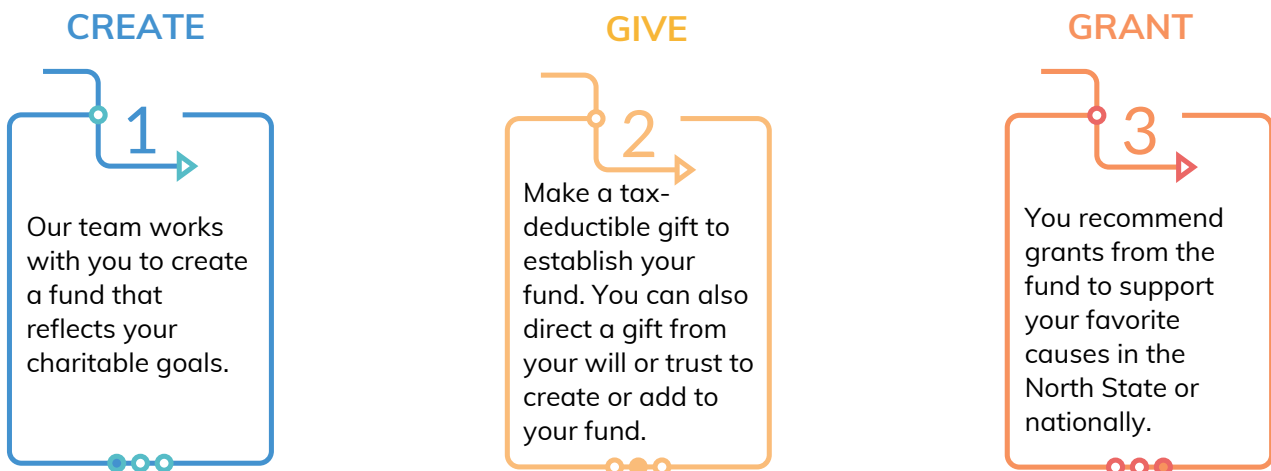
AN INTRODUCTION TO

Donor Advised Funds

Whether for yourself, your family or your business, a Donor Advised Fund offers a convenient, customized way to support the causes you care about

1 Establishing a Donor Advised Fund (DAF)

Establishing a Donor Advised Fund (DAF) at the Community Foundation of the North State (CFNS) can help simplify your giving. DAFs are convenient, flexible tools for individuals, families, businesses, or groups. Our professional staff offer expertise and support to help you create giving plans that maximize your charitable impact.



2 Benefits of a DAF

- Easy to establish and manage
- Can be funded with a wide variety of assets (including cash, stock or real estate)
- Gifts to the fund are tax-deductible
- You choose the name of your fund and how you wish to be recognized
- Grants can be made to any qualified nonprofit of your choice, at your convenience
- 24/7 online fund portal access for simplified record-keeping
- Less costly and no administrative burden of family or corporate foundations
- Staff monitors impact by completing due diligence and collecting grant reports
- Receive grantmaking and gift planning support from our professional staff
- Can be invested with your preferred advisor if you wish (fund minimums apply)

Donor Advised Funds

3 Setting Up a Fund

- Contact CFNS to discuss the type of fund that meets your needs:
 - Endowed – the fund is invested to grow and grant for perpetuity; a percentage of the fund is made available for you to grant each year
 - Non-endowed – the full balance of the fund is available for grantmaking
 - Competitive – the fund is open to receive grant applications which are reviewed and selected for grant awards based on your preferred criteria (award minimums apply)
- Name your fund and sign your fund agreement (e-sign available)
- Make a gift to establish your fund with cash, stock, real estate, or other assets
- Determine the fund's advisor(s) and successor advisor(s) (if applicable)
- Add to your fund at anytime, or include the fund in your estate plans

4 Contact Us to Learn More



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Funds are charged an administrative fee to help cover the costs of grantmaking, investment and administration. Fees vary based on fund type and amount. Please request the current fee schedule.



CFNS can help you realize your philanthropic goals through a variety of giving options. We are happy to meet with you or your professional advisor to customize a plan to meet your needs. The Community Foundation of the North State is a 501(c)(3) nonprofit organization. EIN #68-0242276.