

DONOR ADVISED FUND

- **What is a DAF?**

A Donor Advised Fund (DAF) is a charitable giving account opened by donors to achieve their philanthropic goals both today and in the future.

- **Why DAF?**

Donor Advised Funds are tools that allow donors to plan their charitable giving more strategically. Donations to a DAF receive an immediate tax deduction but can be used to make grants from the fund for years to come.

- **Is a DAF a Private Family Foundation?**

No, because the BCF is a public charity. Depending on your tax situation, a DAF might be more beneficial to your family. DAF's can be named like a family foundation, but do not follow the spending requirements set for private foundations at this time.



**BARTLESVILLE
COMMUNITY
FOUNDATION**

DONOR ADVISED FUND DETAILS

• Fund Details

- Donations (grants) may be made from the fund to any qualifying charitable organization
- Receive an immediate tax benefit at the time of the contribution to the fund. Make grants over time.
- Minimum opening donation \$2,000
- No minimum grant amount
- No minimum annual spend
- Minimum balance \$2,000*
- 1% annual administrative fee
- ~.53% annual investment fee*
* only for invested funds

• Why a DAF at the BCF?

- We handle all the administrative details **locally**
- Administrative fees support **local** community initiatives
- More than 20 years of experience
- Started by **local** philanthropists to support **local** initiatives
- Personal service to help you accomplish your giving goals

Ask us about donor intent and variance power!

Contact our
office today!
918.337.2287