

Bartlesville Community Foundation

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 for grant making 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 because it is a component of a public charity.



**BARTLESVILLE
COMMUNITY
FOUNDATION**

208 E. 4th St - Bartlesville, OK 74003 - 918-337-2287

DONOR ADVISED FUND DETAILS

Fund Details

- Donations (grants) may be made from the fund to any qualifying charitable organization in the U.S.
- 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
- ~.50% 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 25 years of experience
- Started by **local** philanthropists to support **local** initiatives
- Personal service to help you accomplish your giving goals
- We bring donors and causes together

Ask us about donor intent and variance power!

**Contact our
office today!
918.337.2287**