

TYPES OF Donor Advised Funds

A donor advised fund at the Community Foundation of Central Wisconsin is a flexible way for individuals, families, clubs, and businesses to organize your charitable giving.

The Foundation team is here to help you achieve your philanthropic goals. Your fund can be endowed for long-term growth or non-endowed to allow for more flexibility in your giving.

Endowed Donor Advised Fund

When you establish an endowed donor advised fund, your contributions are pooled and invested with all the Foundation's assets for long-term growth. The Board of Directors has set the annual spending rate at 4% of the 12-quarter trailing average balance of the fund. Your available balance is calculated on July 1st and available for distribution as of August 1st each year. Spendable balances not distributed or granted as of June 30th are reinvested into the principal balance for the new fiscal year.

Non-Endowed Donor Advised Fund

A non-endowed donor advised fund offers you the most flexibility for charitable giving. You may make a contribution to the Foundation, receive the tax benefit today, and recommend distribution to charities when you are ready. This type of donor advised fund is also pooled and invested, yet it allows you the flexibility to decide your own annual spending.

Key Benefits of a Donor Advised Fund

- Donor advised funds are a cost-effective and efficient alternative to a private, family, or corporate foundation.
- There is no cost to set up a donor advised fund and the administrative fees are minimal.
- The Foundation provides a diversified portfolio with low management fees.
- The Foundation can accept contributions of many types of assets, including stock and real estate.
- You can recommend grant distributions online through the Foundation's secure website, by email, or mail.
- You can name a second-generation advisor to make recommendations for the fund into the future.



COMMUNITY FOUNDATION
OF CENTRAL WISCONSIN

Serving Portage and Waushara Counties since 1982.

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