



# DONOR ADVISED FUNDS

## SIMPLE AND CONVENIENT

PHILANTHROPY PORTFOLIO

The number one option for donors who value freedom, flexibility, and choice, Donor Advised Funds offer a hands-on approach to philanthropy. Donor Advised Funds are ideal for those wanting to give to multiple organizations and programs throughout the year.

**THE COLUMBUS FOUNDATION** supports your charitable efforts with personalized service and insight about community needs and organizations. We're here to help you help others through the most effective philanthropy possible. We work with donors from all walks of life who want to improve the community through charitable giving. As central Ohio's most comprehensive philanthropic resource, we are dedicated to increasing the effectiveness of your philanthropy, identifying the greatest needs of nonprofit organizations, and helping strengthen our community.

### GETTING STARTED IS EASY.

A Donor Advised Fund is a personalized fund that makes it easy for you to support the issues and organizations you care about in central Ohio or across the country. You can use cash, stock, or other assets to create a named fund, qualify for an immediate income tax deduction, and when it's convenient for you, choose the charities you want to support. It takes \$10,000 or more to open your Donor Advised Fund.



Our Donor Advised Fund was an important step in our retirement planning. It provides us with a tax benefit while we are still working and will allow us to continue to support local arts, civic, and educational organizations, including our out-of-state alma maters, after we have both retired. Plus, we can check out the fund—and even make donations—online, any time we like.”

— KIM AND JUDITH SWANSON

## KEY BENEFITS

# DONOR ADVISED FUNDS

### EASY

Work with our experienced staff to create your own unique fund, and have access to valuable knowledge about area nonprofit organizations. Review your fund, request grants, and utilize our online philanthropic marketplace The Giving Store to make your giving as effective and efficient as possible. We make supporting your philanthropic passions easy.

### FLEXIBLE

Add to your fund anytime, and have access to your fund and grant history seven days a week, 24 hours a day. The Columbus Foundation can accept gifts of many types of assets, including stock and real property. Our staff will work closely with your financial advisor to help facilitate gifts of all types.

### PERSONAL

Your fund is just that, your fund. It reflects the causes and organizations you care about—in central Ohio and beyond. We're here to offer individualized service and strategies to help you carry out your goals and suggest ways to increase your impact through exclusive donor communications, workshops, and special events.

### EFFICIENT

The Columbus Foundation handles all the administrative tasks of achieving your philanthropic goals—from investment options, and keeping track of your gifts and grants; to sending you quarterly statements of activity—all for a nominal administrative fee.

### CONSIDER A DONOR ADVISED FUND IF YOU:

- Demand simplicity and ease.
- Want to manage all of your giving from one convenient account.
- Want to be actively engaged in your philanthropy.
- Wish to give to multiple organizations and programs throughout the year.
- Are interested in learning more about the central Ohio community and its challenges.
- Want to involve your children or family in your charitable giving.
- Are seeking more information about giving opportunities, insights, and perspectives locally, nationally, and worldwide.

### INCREASE THE POWER OF YOUR GIVING

Access information about your fund via The Giving Store 24 hours a day, at [columbusfoundation.org](http://columbusfoundation.org). The Giving Store is your one-stop shop for easy and effective philanthropy. Search more than 1,200 area nonprofits, view your fund summary and giving portfolio, access personalized nonprofit recommendations based on your interests, and suggest a grant to the nonprofit of your choice.

### ABOUT THE COLUMBUS FOUNDATION

The Columbus Foundation serves thousands of individuals, families, and businesses that have created unique funds and planned gifts to make a difference in the lives of others through the most effective philanthropy possible. The Columbus Foundation is **Your Trusted Philanthropic Advisor**® and is among the top 10 largest community foundations in the United States.

### WE'RE HERE TO HELP!

Learn more about The Columbus Foundation by visiting us online at [columbusfoundation.org](http://columbusfoundation.org) or in person at 1234 East Broad Street, Columbus, Ohio 43205. Please contact one of our Donor Services advisors by calling 614/251-4000 or emailing [dsd@columbusfoundation.org](mailto:dsd@columbusfoundation.org).

