

How Can a Donor-Advised Account Help with Year-End Tax Planning?

You may receive a large bonus or other significant income near the end of the year and not have time before the end of the year to decide which charities to support. With a donor-advised account, you obtain an immediate tax deduction for your charitable contribution. Then you can recommend grants to qualified charities at a later time when you are ready to make those decisions.

The convenience and flexibility of a donor-advised account allows you to make substantial contributions to your fund in profitable years and to sustain a similar level of giving to your favorite charities in leaner times.

How Do You Stay Informed About Your Fund's Activity?

Faith Community Foundation issues quarterly and year-end statements of your donor-advised account activity.

Is There a Fee to Establish a Donor-Advised Account?

Faith Community Foundation does not charge a start-up fee. Faith Community Foundation charges a modest annual administrative fee to your donor-advised account.

How Do You Get Started?

Give us a call. We will work with you, and your financial and legal advisors to implement a plan that will achieve your charitable giving objectives while enhancing your tax advantages. Call (515) 664-0600, and let us know how we can serve you.

For More Information...

The following documents are available for download on Faith Community Foundation's website: www.fcfn.org

- ◆ Donor Advised Account Program Description document (.pdf)
- ◆ Donor Application form (.pdf and MS Word (fill-in))
- ◆ Grant Recommendation Form (.pdf and MS Word (fill-in))



FAITH COMMUNITY
FOUNDATION



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Donor Advised Funds



FAITH COMMUNITY
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FAITH COMMUNITY FOUNDATION

What is a Donor-Advised Account?

A donor-advised account through Faith Community Foundation provides a simple, reliable, and effective way to accomplish your charitable giving.

You can establish a donor-advised account today, and recommend grants to the charities you want to support now or in the future. You can add to your donor-advised account at any time and receive tax benefits for each new gift.

When you establish a donor-advised account through Faith Community Foundation, you benefit from professional assistance with decades of experience. We are committed to providing exemplary services driven by values you can appreciate, as well as proven management performance.

Why Establish a Donor-Advised Account, Instead of Giving Directly to Individual Charities?

Contributing your donation through a Faith Community Foundation Donor-Advised Account enables you to use experienced, qualified gift planning practices with the confidence that

appropriate safeguards are used to be sure your donation qualifies for the appropriate tax benefits, while assuring that your charitable funds are preserved and used as intended by qualified charities that you have recommended.

Furthermore, creating a Faith Community Foundation Donor-Advised Account provides access to a wealth of charitable-giving expertise and the flexibility to donate assets (such as appreciated stock, real estate, and other appreciated assets) that many smaller organizations may not be prepared to receive on their own.

How Are Grants Made from Your Fund?

Submit a grant recommendation form provided by Faith Community Foundation. (*For your convenience, downloadable Grant Recommendation forms are available on our website.*) As the donor, you have the right to make recommendations for grants that must be approved by the Faith Community Foundation Board of Directors.

Where Can Grants Be Made from Your Fund?

All grants from Faith Community Foundation donor-advised accounts must be made to IRS tax-exempt charities,

including religious organizations, educational organizations, mission organizations, and other IRS tax-exempt organizations in the United States of America.

Is There an Annual Distribution Requirement or Minimum Grant Amount?

Most Faith Community Foundation donor-advised accounts make regular payouts. However, no minimum grant or annual payout is required with a donor-advised account through Faith Community Foundation under existing law.

Can Grants be Made Anonymously?

Yes. We make your grants anonymous, if requested, or in the name of your fund.

Can Your Children Advise Grants?

Yes, with your permission. You can delegate to others the right to recommend grants to qualified charitable organizations on your behalf from your Faith Community Foundation Donor-Advised Account. You may want to designate your Faith Community Foundation donor-advised account as a beneficiary in your Last Will and Testament and grant your children the right to recommend qualified charities to receive grants from your donor-advised account when you are gone.