

TOOLS FOR GIVING

A personal approach to giving

Donor Advised Fund



Opening a Donor Advised Fund allows you to make a tax deductible gift to the Door County Community Foundation today (or in your estate plans). Then you and/or your family remain actively involved in distributing your gift to the causes you care about the most - for years to come! It's a simple, inexpensive, and tax-efficient way to administer your own foundation!

How it works

- You make a gift to the Door County Community Foundation – you can give cash, appreciated stock, real estate, or other assets. A minimum gift of \$1,000 is all it takes to open your own personal Donor Advised Fund.
- We set up a special Fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive a tax deduction in the tax year your gift is made.
- You suggest charities that should receive distributions from your Fund – working with our professional staff to support the causes and organizations you care about most.
- If a gift to your Fund is incorporated into your estate plans, you can designate your heirs to be “successor advisors” to the Fund.
- We handle all the administrative details and issue grants to charities in the name of the Fund you establish (if you prefer, grants can be made anonymously).
- If you so choose, your gift can be placed into an endowment that is invested over time. Earnings from your Fund are used to make grants addressing community needs. Your gift – and all future earnings from your gift – can become a permanent source of community capital, giving back literally forever.

Giving Back

Dick and Anne Egan of Sister Bay love living in Door County, so it's only natural that they want to give back to sustain the community they hold so dear.

“The Community Foundation is a great way to leave a legacy to the Door County community. Each of us have “favorite” organizations that we support with our time, talents and treasure, but a community is more than a few organizations. Our Door County Community Foundation provides an opportunity for Annie and me to support some or all of these activities today and in our planned giving so that Door County will continue to be a special place.”

- Dick Egan



Donor Advised Funds

Ten reasons people choose to give through the Door County Community Foundation

one

We are a **local organization** with deep roots in the community.

two

Our professional staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

More benefits

Donor Advised Funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grant awards made possible by their gifts. If you have a range of community interests, you may find that it's an ideal vehicle for fulfilling your charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

Your gift can be combined with others to increase its impact, and you can add to the Fund you establish at any time, receiving tax benefits with each new gift. You can establish a Fund today and make grant recommendations now or in the future. And if you endow your gift, it becomes a permanent community funding resource.

The Door County Community Foundation provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to the Door County Community Foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact the Door County Community Foundation.

give
DOOR COUNTY

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