Make Giving EASY



A donor advised fund keeps charitable giving simple.

You make an initial gift and may receive an immediate charitable income tax deduction. You then determine when to make grants from the fund, what ministries you wish to support, and the amount you want to give. Grants go through a simple process at the Foundation for approval. Your gifts don't have to go to Presbyterian Church (U.S.A.) organizations. Gifts to most 501(c)3 organizations are allowed, and encouraged subject to Foundation approval under the Donor Advised Fund Program.

Manage your fund online

No paperwork necessary! Online tools are available to manage your fund easily. You can track your giving history, make grant recommendations and make additions to your fund, all with just a few clicks.

Donor Advised Funds | Presbyterian FOUNDATION

Teaching Generosity

Giving is a joy – but it requires discipline, says Rev. Joseph Moore. His family's donor advised fund at the Presbyterian Foundation helps his family practice disciplined generosity that is teaching his children why and how to support causes they love.

Joseph and his wife, Dr. Shelley Moore, make monthly contributions to their donor advised fund, and discuss with their children what organizations should receive their support.

"I went with the Foundation partly because I serve at the Foundation, but I also like the investment options we have, including a socially responsible option, which aligns with our values as a family," Moore says. "We named it the Moore Family Foundation Fund, so it's fun to sit around the dinner table and discuss what we should do with the funds our family has set aside. We think it's good modeling for them."

Along with supporting their church congregation, the Moores support a local food bank and a non-profit housing group in Fort Collins, Colo., where they live. And each December, their children, Micah, Liam and Hettie, can make a $1,000 grant each to a non-profit of their choosing. One of their children chose a non-profit group that supports his school library, and another made gifts to the World Wildlife Fund. They also chose to meet emergency needs in their community.

"We've talked about whether or not it is better to support 10 things at $100 or one thing at $1,000," Moore says. "So far, they've gone all in one thing every year."

The fund is easy to manage online. Joseph or Shelley can log on to the online portal, and with a few clicks create a grant request. "I appreciate the consistency that every month we're adding to it," Joseph says. "I also appreciate that it's tied to the market. The fund has actually grown. Every time it grows, that's more money we can use for family mission."



"Every time our fund grows, that's more money for mission."

— Joseph Moore, whose family has a donor advised fund.

5 Great Reasons to Open a Donor Advised Fund with Presbyterian Foundation

FLEXIBILITY

You can make gifts to your local congregation and far beyond, supporting all of the church's ministries and/or charities that are close to your heart.

GIVING ON YOUR SCHEDULE

You may receive an immediate tax deduction when you open your fund, yet you can take months or even years to recommend grants. You can also schedule recurring grants.

PLANNING YOUR LEGACY

You can ensure that giving continues after your lifetime through instructions to make grants you designate or to name an heir to continue as a grant advisor.

CONFIDENTIALITY

You can recommend that some grants be made anonymously and have others include your name.

SOLID INVESTMENT OPTIONS

Choose among investment options according to your own short- and long-term plan for making grants.

DONOR ADVISED FUND TIP

Share your grant recommendations with your children and/or grandchildren to teach them about the causes you love. They'll learn more about what matters to you and will model your generosity. Even young children can enjoy giving through a donor advised fund.

We're Ready to Talk to You

To create lasting family values, build a culture of generosity within your family, or simply fund the many charities you personally care about, talk to a Presbyterian Foundation Ministry Relations Officer about the flexibility and simplicity of a donor advised fund. Call us at **800-858-6127** or visit **presbyterianfoundation.org/mro** to find your Ministry Relations Officer.

A Giving Scenario

You and your spouse open a Donor Advised Fund with **$30,000**. You receive a charitable tax benefit for the full amount on that year's tax return.



You decide to support a special project at your church. Your spouse has always volunteered and supported the Children's Home in your community.

$1,500 grant to Your Presbyterian Church to be used for the All Are Welcome program.

$1,000 grant to the Children's Home.



During a family dinner, your daughter tells about a project that she is involved with to help supply books to young children just learning to read. She would like the family to support this project with a gift.

$300 grant to the Reading Program



And on it goes — grants are made to the many charities that you support on a regular basis, but now it is easily managed in one giving fund. Online account access makes it very convenient to make grants, research other charities that are aligned with your interests, make additional contributions to the fund, and review at a glance your giving history.



* $2,500 minimum to open a Donor Advised Fund with the Presbyterian Foundation.

Presbyterian FOUNDATION

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