

Donor-Advised Funds



What Is a Donor-Advised Fund?

A donor-advised fund (DAF) is a charitable financial vehicle that allows donors to receive an immediate tax deduction and advise grants over time to charitable causes that align with their values. Donor-advised funds are one of the most efficient, flexible, and cost-effective giving vehicles and can eliminate capital gains on long term appreciated stock.

Who Should Consider a Donor-Advised Fund?

- » Those who want to make a meaningful impact in their area of interest.
- » People seeking tax-efficient strategies for their philanthropic goals without the restrictions of private foundations and some commercial entities.
- » Families that want to establish a long-term charitable plan and involve multiple generations in their philanthropic journey.
- » Individuals who want a streamlined way to manage their charitable giving.
- » Donors who value discretion in their charitable giving.

Benefits of a Donor-Advised Fund

Support your favorite nonprofits. Recommend contributions to your favorite nonprofits and review fund balances 24/7 through our secure online donor portal.

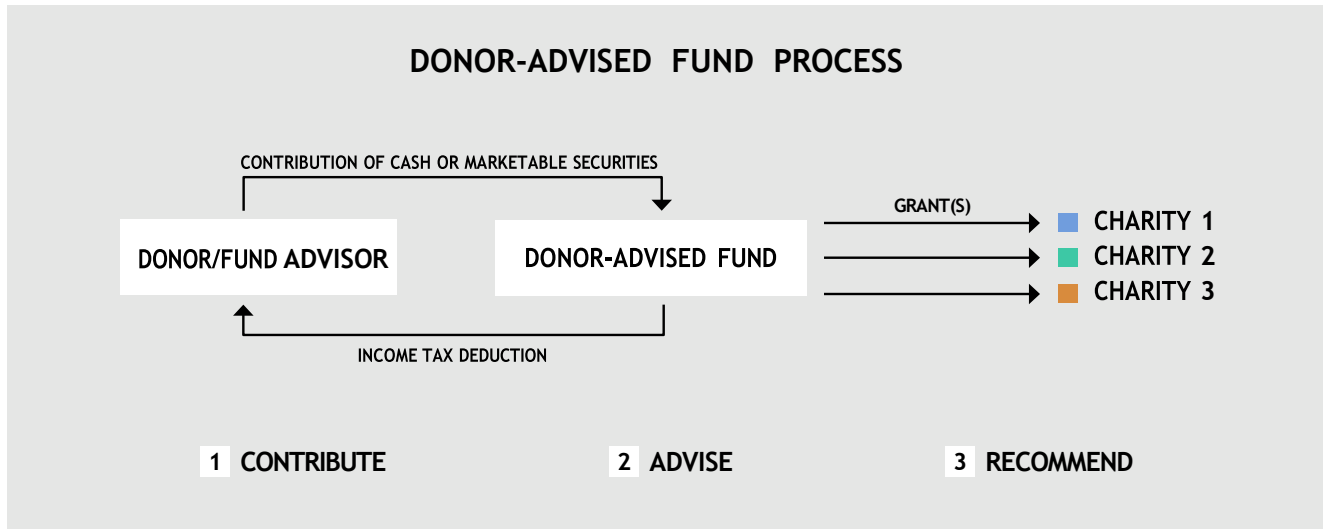
Flexible philanthropy. A donor-advised fund can be established by an individual, family, business, or organization. Use your donor-advised fund to recommend grants here in the East Bay or anywhere, and avoid restrictions required of private foundations and some commercial entities.

Asset options. Use a wide variety of assets to establish or replenish a donor-advised fund beyond cash and publicly-traded stock—such as mutual funds, fine art, cryptocurrency, or privately held C-Corp or S-Corp shares—which other entities may or may not be able to accept directly. Gifts of appreciated assets qualify for tax deductions at current fair market value (as opposed to a cost-basis when contributed to a private foundation) and can avoid capital-gains taxes.

Strategic philanthropy. You have access to EBCF's expert staff who can help you develop a strategic giving plan, identify nonprofits to invest in, engage your family, connect with other donors, and co-invest with others to make the greatest impact.

How Does a Donor-Advised Fund Work?

- 1** Donor gives assets to EBCF, who will administer the fund.
- 2** Fund Advisors recommend grants to eligible nonprofits for a charitable purpose.
- 3** EBCF conducts necessary due-diligence and distributes grants from the fund to eligible nonprofits.



Philanthropy, Simplified.

Give: Open your fund with a gift of cash or other assets and continue to add to your fund over time. Enjoy an immediate charitable tax deduction when you establish your fund and every time that you add assets to it.

Invest: Your fund assets can grow tax-free in pooled, professionally managed investment pools. We offer three investment pools – each designed for a different grantmaking style, market returns, and timeline. Investment strategies can be tailored to your grant time horizons and personal goals and every pool is built to reflect EBCF's values.

Grant: You retain the advisory privileges to recommend grants at any time to eligible nonprofits here locally, nationally or internationally. We take care of all the administrative support, due diligence, and required reporting.

LEARN MORE AT [EBCF.ORG/GET-STARTED](https://eastbaycf.org/get-started)

To open a Donor-Advised Fund, contact our Philanthropy team at (510) 208-0841 or email philanthropy@eastbaycf.org.

In compliance with federal regulations, a donor may not recommend grants to individuals nor receive a material benefit from the beneficiary nonprofit organization in exchange for a grant (e.g., dinner tickets, participation in golf tournaments, etc). Donor-advised funds cannot be used for these purposes.

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