



DONOR ADVISED FUNDS AT A GLANCE FOR DONORS

A donor advised fund (DAF) is a flexible option for donors who have a passion for giving to the Catholic organizations they care about. The fund is created with a gift to the Catholic Foundation, but you may advise and recommend what grants are to be made for charitable purposes, according to what matters to you most.

You are encouraged to recommend the majority of the grants to Catholic organizations within the archdiocese as grant recipients, but you may also include universities and 501(c)3 public charities. All donor advised fund grants must be in accordance with Catholic teaching. The staff at the Catholic Foundation is aware of the needs of the Catholic community, and can assist you in discovering opportunities to make an impact with your giving.

How can you create a donor advised fund at the Catholic Foundation?

- You can create a new fund with gifts of cash, appreciated securities, real estate and other assets.
- You can move a current donor advised fund from elsewhere to the Catholic Foundation.
- You can close a private foundation and move it to a donor advised fund at the Catholic Foundation.

What are the benefits of creating a new Donor Advised Fund with the Catholic Foundation?

- Sustains charitable giving over time, through retirement and beyond
- Creates a lasting Catholic legacy in your family when you later endow your fund
- Flexible and easy to establish
- Provides immediate tax deduction in the year your gift is made
- Reduces capital gains when you donate appreciated assets
- Invested professionally, in agreement with the United States Conference of Catholic Bishops' Socially Responsible Investment Guidelines
- Grows tax-free for future grants, which are made in accordance with Catholic teaching
- Provides a low-cost alternative to a private foundation
- Administrative work handled by the Catholic Foundation
- Ease of tracking all of your giving in one place

How does creating a new donor advised fund work?



For more information on creating a donor advised fund, please contact the Catholic Foundation of North Georgia at 404.497.9440 or info@cfnga.org.