

# Corporate Advised Funds

Creating a corporate advised fund at the Austin Community Foundation (ACF) is an easy and efficient way for your company to give back locally—and to communities across the U.S. or internationally. We work with companies of all sizes to help create customized corporate philanthropy programs to make a positive impact. You can outsource all or part of your corporate giving and focus on business.

## Why open a fund with us?

- / Vision and strategy – We can help you create and implement a strategy to meet your philanthropic goals and objectives
- / Engagement – Invitations to exclusive Foundation events with other donors, community leaders and local nonprofit grantees
- / Expert staff – Access to our team of experts on corporate philanthropy, community needs and grantmaking best practices
- / Research – Data on community needs as a means to help determine funding priorities; site visits to assess and inform grantmaking; financial data on local nonprofits
- / Manage solicitations and relationships with nonprofit organizations
- / Annual report – Detailed report on philanthropic activity and impact of your fund
- / Maximum allowable tax deduction for charitable donations
- / International giving – Facilitate grants made outside the U.S.
- / Ability to accept variety of charitable donations – cash, appreciated stock, pre-IPO stock, real estate and other assets
- / Compliance – ACF operates in full compliance with state and federal regulations related to grants and contributions
- / Efficient – No additional tax return or audit required as with a corporate foundation
- / Access – Easy and secure 24/7 online portal to access fund balance and grantmaking tools

| Assets            | Corporate Advised Fund Fees                                   |
|-------------------|---|
| Below \$1 million | 1.25%   |
| Above \$1 million | 1%  |
| Additional fees   | Annual maintenance fee: \$100 - \$5,000 depending on services |

Fees are assessed on deposits monthly. Additional fees may apply for funds with a high number of transactions or complexity.

## Get in Touch

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# Corporate Advised Funds (cont.)

## Service Options Breakdown

| Services                             | How ACF Supports You   |
|--------------------------------------|--|
| Comprehensive Philanthropic Services | <ul style="list-style-type: none"><li>/ Customized philanthropic advising with our expert staff*</li><li>/ Access to in-depth local knowledge through our staff and network of community leaders</li><li>/ Invitation to exclusive events and to participate on ACF grants committees</li><li>/ Guidance in defining your corporate philanthropic strategy and annual fund review to assess effectiveness of giving</li></ul>  |
| Grantmaking Services                 | <ul style="list-style-type: none"><li>/ Define strategy, engage corporate team members and assess the effectiveness of grantees*</li><li>/ Give locally, to any nonprofit in the U.S. and abroad</li><li>/ Ability to review and fund requests made through Foundation's Community Grants program, providing a broader opportunity and knowledge about local needs</li><li>/ Facilitate and administer committee or advisory board decision*</li><li>/ Vet and evaluate organizations and project proposals*</li><li>/ Custom grant application*</li><li>/ Field inquiries and solicitations from the nonprofit community</li></ul>  |
| Administrative Services              | <ul style="list-style-type: none"><li>/ Immediate charitable deduction for your gift (amount allowable by law)</li><li>/ Ability to consolidate all your charitable giving</li><li>/ Cost-effective access to Foundation's audit and tax professionals</li><li>/ Administrative oversight including IRS-mandated tax returns and annual audits</li><li>/ View fund activity online at anytime</li><li>/ Full back-office services (all gift and grant processing, financial statements, etc.)</li><li>/ Customized stationary bearing your fund name</li><li>/ Plan, facilitate and document advisory board meetings</li><li>/ Monthly financial statement, quarterly fund statement, annual fund review</li><li>/ A fund may be opened with a gift of cash, appreciated stock, mutual fund shares, closely held stock, real estate, retirement account, life insurance, bequest, or other deferred gift</li></ul> |
| Marketing                            | <ul style="list-style-type: none"><li>/ Promote effective corporate responsibility's philanthropy through our social media, blog, newsletter and events</li><li>/ Visibility for your business through the Foundation and strategic recognition by grant recipients</li></ul>  |
| Employee Giving                      | <ul style="list-style-type: none"><li>/ Seamlessly integrate corporate philanthropy and employee giving*</li><li>/ Reporting tools that help tell the story of your community impact</li><li>/ Automate donation matching and integrated payroll deduction</li><li>/ Provide employees with budgeting and discovery opportunities</li></ul>  |

\*Additional fees may apply depending on scope of services