

# DONOR ADVISED FUNDS

**A donor advised fund (DAF) at Austin Community Foundation is your personal account for charitable giving.**

Whether you’re looking for a simple way to optimize giving or craving a strategy to guide your philanthropic vision, a DAF at the community foundation offers a thoughtful, straightforward approach to charitable giving.

A DAF accepts a variety of assets and offers you the convenience of supporting charitable organizations when and where you choose. The assets of your fund can be invested for potential growth, allowing you to increase your charitable giving.

When you establish a fund at ACF, you gain access to a deep familiarity and connections to our community, as well as unique insights into the causes that donors care about most. And unlike establishing an account elsewhere, your charitable assets are mobilized for maximum impact in the community and beyond.

## Benefits and Services

- / Immediate charitable deduction for your gift (amount allowable by law)
- / Ability to consolidate all your charitable giving
- / Ability to accept complex gifts - cash, appreciated stock, privately held stock, business interest, real estate, and other assets
- / Option to invest in the market or not
- / Invested funds may be permanent (endowed) or 100% available (quasi-endowed)
- / Give to any nonprofit in Central Texas, the U.S., and abroad (some limitations apply to international grants)
- / Pass-through giving to nonprofits (ex: complicated asset or desire for confidentiality)
- / Easy and secure access to fund 24/7 through online donor portal
- / Make grants online any time
- / Ability to review and fund requests made through the Foundation’s Community Grants program
- / Invitations to exclusive events and networking opportunities

	Endowed & Quasi-Endowed Funds	Non-Endowed Funds
Fund fee	Up to \$1 million – 1.0% Next \$2 million – 0.75% Next \$7 million – 0.50% Next \$10 million – 0.25% Over \$20 million – 0.10% Minimum Annual Fee: \$250	Below \$1,000,000 – 1.50% Deposits Above \$1,000,000 – 1.00% Annual fee: \$250 Fees are assessed on deposits monthly.
Additional fees	Investment expenses average 0.25-0.8% depending on investment option. Fee includes investment counsel.	
Fund minimum	\$25,000 (recommended)	No minimum

*Additional fees apply for gifts made with credit card.*

*The spending policy for endowed funds provides for a maximum available for granting and is calculated as 4% of the average trailing 20 quarters of the fund’s market value.*