

Donor Advised Funds

You Make the Difference

Each of us has one life to live...

One chance to leave the world better than we found it;

One opportunity to toss our pebble into the pond and watch the ripple we create;

One legacy to leave.

At CFAAC we know that every ONE of us makes a difference. That's why we are focused on growing philanthropy one person, one family, one business at a time. The more of us who give, the more good we can do for our community, together.

Opening your own Donor Advised Fund at CFAAC may be an important next step.

Simplify Your Giving

With a single gift to CFAAC you can establish a Donor Advised Fund that allows you to give to the causes you care about most. It's like having your own private family foundation, only without the hassle and expense.

Make an Impact

As your partner in philanthropy, CFAAC helps you maximize your giving and make long lasting impact with your philanthropic investments.

Consult with Experts

CFAAC distributes \$5 to \$7 million in grants each year to a variety of nonprofit organizations. We monitor all areas of community need—including human services, education, the environment, healthcare, the arts, and economic development.

Choose Your Timing

Your gift to CFAAC, a 501(c)(3), qualifies for an immediate tax deduction, allowing you to make a gift when it's most financially beneficial to you. You can add to the fund at any time and in any amount.

Choose Your Nonprofits

Through your fund, you may recommend grants to any qualified U.S. nonprofit organization. Grants to international organizations are considered on a case-by-case basis. CFAAC staff researches each nonprofit you would like to support to ensure it is in good standing with regulators and then issues the check from your fund. And, at your request, we can make inquiries on your behalf while protecting your anonymity.

Benefits and Services

- Expert staff with in-depth knowledge to help advance your philanthropic giving strategy and financial goals.
- Highly customized service tailored to your philanthropic interests.
- The opportunity to give your Donor Advised Fund a name that highlights your fund's purpose.
- Ability to endow your fund, ensuring it will honor your legacy and benefit the causes you care about forever.
- Real-time access through the online portal where you can recommend grants and track your grantmaking activity.
- Timely and efficient grant administration and processing.
- Flexible and expertly managed investment options.
- Ability to donate diverse assets including cash, appreciated stock, real estate and other assets and receive the maximum allowable tax advantages.
- No federal excise tax on investment income, no minimum annual payout requirement, or need to file a separate tax return like with a private foundation.
- No legal liability. CFAAC remains in full compliance with state and federal regulations as they relate to grants and contributions.
- Invitations to exclusive community foundation events, networking opportunities with other donors, and community leaders.

Notes: Donor Advised Funds and supporting organizations are not eligible for IRA Charitable Rollover gifts. However, other funds at CFAAC are eligible for these gifts, including Help Our Neighbors, Grants 4 Teachers, Strengthening Nonprofits, Fund for Anne Arundel, Scholarships, the Community Leadership Fund for CFAAC, and more.

Non-Endowed Funds must maintain a minimum balance of \$10,000. Endowed Funds must maintain a minimum balance of \$25,000.

**Our knowledgeable staff is happy to meet with you and share more,
please call us at 410.280.1102.**

Care. Connect. Contribute.