

A personal approach to giving

Donor Advised Fund



Opening a Donor Advised Fund allows you to make a gift to the Hamilton Community Foundation, then remain actively involved in suggesting uses for your gift.

How it works

- ♦ You make a gift to the Hamilton Community Foundation. You can give cash, appreciated stocks, real estate, or other assets.
- ♦ We set up a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose. (Permanent funds require a minimum \$5,000 balance.)
- ♦ You receive tax benefits in the year the gift is made.
- ♦ You recommend uses for the fund--working with our staff to support the causes and organizations you care about most.
- ♦ Your recommendations are presented to our Foundation Board of Trustees for approval.
- ♦ We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously).
- ♦ As with any Foundation fund, you have the option to place your gift into our community grants endowment. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—can be a permanent source of community capital, helping to do good work forever.

A personal connection

Joel and Marilyn began their relationship with the foundation for their charitable giving in the 1970s after Joel began managing the local McDonald's Restaurants. "The Foundation was growing, and it was so pleasant to work with the staff that we just wanted to assist with any projects where they needed help," Marilyn said. The Schmidts chose to establish a Donor Advised Fund in their family's name. They now meet with the community foundation's staff to recommend grants in the areas they care about most. Through their donor advised fund, Joel and Marilyn have supported numerous quality of life projects such as the City of Sculpture, the Marriott Hotel and ArtSpace project in downtown Hamilton and events such as the July Fourth fireworks and the Festival of Trees. "It is a great source of pride for us to drive by projects knowing that we helped to make it possible," Joel said.

Ten reasons people choose to give through community foundations

one

We are a local organization with deep roots in the community.

two

Our staff has broad expertise regarding community issues and needs.

three

We provide highly personalized service tailored to each individual's charitable and financial interests.

four

Our funds help people invest in the causes they care about most.

five

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

six

We partner with professional advisors to create highly effective approaches to charitable giving.

seven

We offer maximum tax advantage for most gifts under federal law.

eight

We multiply the impact of gift dollars by pooling them with other gifts and grants.

nine

We build endowment funds that benefit the community forever and help create personal legacies.

ten

We are a community leader, convening agencies and coordinating resources to create positive change.

More benefits

Donor Advised Funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grant awards made possible by their gifts. If you have a range of community interests, you may find that it's an ideal vehicle for fulfilling your charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

Your gift can be combined with others to increase its impact, and you can add to the fund you establish at any time, receiving tax benefits with each new gift. You can establish a fund today and make grant recommendations now or in the future. And if you endow your gift, it becomes a permanent community funding resource.

Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to our community foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact your community foundation.

For more information on how the Hamilton Community Foundation can help you with your charitable giving contact Katie Braswell, vice president at, (513) 863-1717 or kbraswell@hamiltonfoundation.org.