

DONOR ADVISED FUND

A PERSONALIZED APPROACH TO GIVING



"I created my Donor Advised Fund because I wanted a trusted organization with a mechanism to make charitable donations."

-Kathy Klink

A PERSONAL CONNECTION

Kathleen Klink created her Donor Advised Fund with the Hamilton Community Foundation in 2005.

A retired educator and school superintendent, Kathy currently volunteers for a number of local initiatives. Because supporting the community and giving back is such a major focus for her, she created the Donor Advised Fund to direct her charitable giving where her passions lie.

Kathy says her confidence in the Hamilton Community Foundation stems from an excellent reputation, competent staff and a philosophy that supports her values.

BENEFITS OF AN ADVISED FUND

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

- ♥ **Give where you want** | Use your Donor Advised Fund to make donations to any non-profit, school, church, or government agency that you care about, anywhere in the country.
- ♥ **Simplify your deductions** | Each gift to your fund is tax deductible in the year it's made, not with each distribution of funds, maximizing your charitable tax benefits.
- ♥ **Timing is everything** | With no annual giving requirement you can give to causes when it feels right to you and your family, giving you flexibility and control.
- ♥ **Benefit from market appreciation** | You have the option to invest and grow your gift alongside the Foundation's other assets.
- ♥ **Secure online access** | You can view your fund balance and make grant recommendations online anytime.

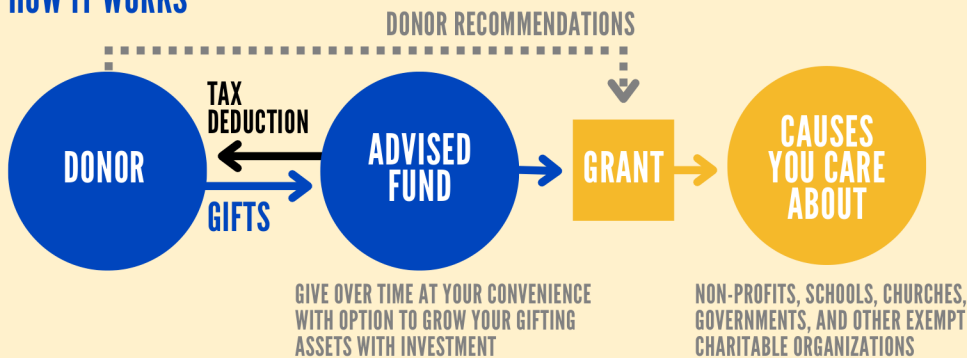


GIVE LOCAL FOR LOCAL IMPACT

EVERY GIFT SUPPORTS OUR COMMUNITY'S LEGACY

WHY GIVE THROUGH THE FOUNDATION?

HOW IT WORKS



Donor Advised Funds are convenient, flexible tools for individuals, families, businesses or groups that want to be personally involved in suggesting grant awards from their Fund. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations). 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 in your legacy.

STAFF SUPPORT

Our staff offers expert understanding of community needs, delivering personalized service that aligns with individual charitable and financial interests.

GIVING EXPERTISE

We work with you or your financial advisor to offer flexibility, accepting donations in the form of cash, stocks, bonds, or other complex forms of giving. These gifts usually qualify for maximum tax benefits.

STAYING POWER

Since 1951 we have established enduring endowment funds that perpetually benefit the community and create lasting legacies for our donors. With over \$150M under our care, we have the stability to ensure these legacies continue to make a positive impact forever.

COMMUNITY LEADERSHIP

As a community leader, we bring together various agencies and coordinate resources to enact positive change. By choosing to give through us, you're not just contributing to a cause, but bolstering and expanding our collective impact on the community.



CALL US TODAY!

For more information on how the Hamilton Community Foundation can help you with your charitable giving, contact:

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