



**ROSS COMMUNITY  
FOUNDATION**  
Affiliate of the  
Hamilton Community  
Foundation

# DESIGNATED FUND

GIVE WITH PURPOSE



*"Knowing exactly where you want your charitable dollars to go makes the Designated Fund the perfect Fund for you."*

*-Designated Fund holder*

## A PERSONAL CONNECTION

Anna and Adrian Schultheiss knew exactly where they wanted their charitable dollars to go. That made establishing a Designated Fund for animals an easy choice.

Born and raised in Butler County, the Schultheiss' shared hobbies like gardening and traveling, but it was their love and compassion for animals that inspired the Anna and Adrian Schultheiss Memorial Fund to support the Animal Adoption Foundation in Ross.

Creating a Designated Fund ensures that a charitable organization that you love will receive a steady source of income.

## BENEFITS OF A DESIGNATED FUND

**Opening a Donor Designated Fund** allows you to support the good work of a specific nonprofit organization or project. Because it's given through your Community Foundation, your gift provides the organization you select, not only funding, but also planned giving and investment management services with the power of endowment.

- ♥ **Give where you want** | You identify the non-profit, school, church, or government agency that the Fund will benefit, 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.
- ♥ **Benefit from market appreciation** | By having the option to invest and grow your gift alongside the Foundation's other assets.
- ♥ **Maximize your tax benefit** | Designated Funds can be funded through required minimum distributions of retirement accounts.
- ♥ **Secure online access** | You can view your fund balance and see the impact your Fund is making.

An affiliate of the Hamilton Community Foundation

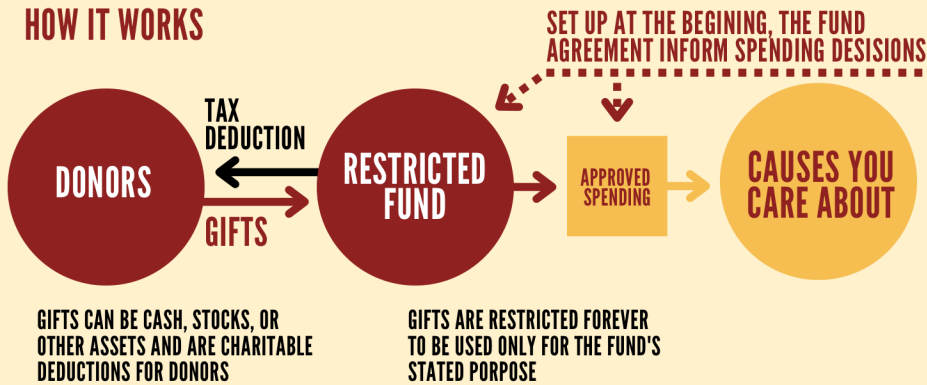


# GIVE LOCAL FOR LOCAL IMPACT

## EVERY GIFT SUPPORTS OUR COMMUNITY'S LEGACY

## WHY GIVE THROUGH THE FOUNDATION?

### HOW IT WORKS



A Designated Fund provides you a wonderful way to give back to one or more specific organizations that have touched your life. Your gift provides more than just funding—your favorite organization will benefit from your Community Foundation's investment, stewardship and ability to manage endowment funds. Because your Community Foundation handles the details, the nonprofit organization's staff is freed up to focus on its mission. And, the Community Foundation can facilitate even the most complex forms of giving, such as planned gifts or gifts of appreciated stock or real estate. You can add to the Fund at any time. If the organization you select ceases to exist or changes in mission, the Fund can be redirected so that it continues to address your charitable intent.

### 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

We are dedicated to establishing enduring endowment funds that perpetually benefit the community and create lasting legacies for our donors. With millions of dollars 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 Ross Community Foundation can help you with your charitable giving contact:

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