



YOUR ONLINE CHARITABLE CHECKBOOK

A donor-advised fund offers you all the flexibility that you want in a giving plan. You can respond to immediate needs in the wake of a disaster, invest in long-term initiatives of your church, or support local or global ministries where your resources are critical.



You make an initial gift and may receive an immediate charitable income tax deduction. You then determine when to make grants from the fund, what ministries you wish to support, and the amount you wish to give.

Online tools are also available to manage your fund: track your giving history, make grant recommendations, make additions to your fund, research and select the charities you wish to support — within the Presbyterian Church (U.S.A.) and beyond.



AN EASIER WAY TO GIVE

Giving has always been important to Jamie and Anne Dale. They donate regularly to a long list of charitable organizations, including their congregation, Warren Wilson Presbyterian Church in Swannanoa, North Carolina.

“We sit down every year and decide what we want to give,” Jamie says. But now, instead of Anne spending time every month writing checks, they have set up regular contributions through a Donor-Advised Fund at the Presbyterian Foundation. “The new system saves time,” says Jamie. “For our bookkeeping purposes it’s much simpler.”

The Dales received a tax deduction when they set up their DAF, and they receive an additional tax deduction each time they make additional gifts to the fund.

“We had some stocks that were given to me when I was a child,” Jamie explains. “Selling them would have incurred a high capital gains tax.” Their financial advisor told them, “The best thing to do would be to give the money away” through a donor-advised fund.



“All the blessings we enjoy are Divine deposits, committed to our trust on this condition, that they should be dispensed for the benefit of our neighbors.” — John Calvin

FAMILY GIVING

Donor-Advised Funds (DAF) from the Presbyterian Foundation come with a suite of online tools to make your charitable activity convenient and flexible. They also make the DAF an excellent vehicle for teaching your family about giving.

Young families use the DAF to explore giving opportunities in areas of ministry that appeal to them. Along the way, parents can talk to children about how they give, how much to give, and why they set aside funds to give as part of their Christian life and discipline.

Older parents are using DAFs as a way to talk about legacy with their grown kids — often naming them as successor advisors to their funds, to continue ministries of giving in future generations. DAFs provide excellent opportunities to talk about causes and ministries that donors have found important during their lifetimes, and to set examples of living generously.

GIVE THE WAY YOU WANT TO GIVE

FLEXIBLE: You can make gifts to your local congregation and beyond, supporting all the ministries or charities that are close to your heart.

GIVING ON YOUR SCHEDULE: You may receive an immediate tax deduction when you open your fund, yet you can take months or even years to recommend grants. You can also schedule recurring grants.

LASTING LEGACY: You can ensure that giving continues after your lifetime through instructions to make grants you designate or to name an heir to continue as a grant advisor.

CONFIDENTIALITY: You can recommend that some grants be made anonymously and have others include your name

INVESTMENT OPTIONS: Choose among investment options according to your own short- and long-term plan for making grants.

To create lasting family values, build a culture of generosity within your family, or simply fund the many charities you personally care about, talk to a Presbyterian Foundation Ministry Relations Officer about the flexibility and simplicity of a donor-advised fund. **Call us at 800-858-6127.**

A GIVING SCENARIO

Let's say you and your spouse open a Donor-Advised Fund with **\$10,000**.* You receive a charitable tax benefit for the full amount.



You decide to support a special project at your church for the homeless. Your spouse has always volunteered and supported the Children's Home in your community.



- \$500 grant** to First Presbyterian Church to be used for the All Are Welcome program
- \$750 grant** to Children's Home



During a family dinner, your daughter tells about a project that she is involved with to help the elderly who are without families and are lonely. She would like the family to support this project with a gift.



- \$300 grant** to Elder Services



And on it goes — grants are made to the many charities that you support on a regular basis, but now it is easily managed in one giving fund. Online account access makes it very convenient to make grants, research other charities that are aligned with your interests, make additional contributions to the fund, and review at a glance your giving history.



* \$2,500 minimum to open a Donor-Advised Fund with the Presbyterian Foundation.



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