

Oregon

Community

Foundation



GUIDE TO

Donor Advised Funds



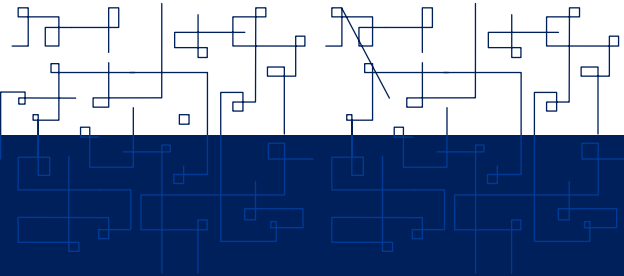
EST. 1973

TOGETHER, WE TRANSFORM GENEROSITY INTO MEASURABLE IMPACT.

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GENEROSITY INTO MEASURABLE
IMPACT.

“WE CAN GUIDE THE
DIRECTION OF OUR
DONATIONS, MAKING
THOSE DECISIONS
WITH THE FOUNDATION
ANNUALLY. THAT’S
WHAT’S UNIQUE ABOUT
OCF.”

DUNCAN CAMPBELL
DONOR



How Your Advised Fund Works



You establish and name your fund by creating a fund agreement, with the assistance of OCF.

- You make a gift of cash or other assets to OCF to start your fund.**
- You may be eligible to receive an immediate tax deduction for your charitable contribution.**
- Your fund is expertly invested.**
- You recommend grants from your fund that are promptly reviewed and acted upon.**
- You may add to your fund at any time, including through your estate.**

Your philanthropy is supported by OCF staff with strong statewide knowledge and ability to connect you to nonprofits and other donors who care about the same issues as you

Benefits of an OCF Advised Fund

PERSONAL SERVICE

OCF Advised Funds are managed by a professional investment manager, but you have the ability to interact directly with the investment manager. This allows you to discuss your investment goals and preferences, and to receive personalized advice and guidance from the investment manager. You can also request to meet with the investment manager to discuss your investment strategy and to review your investment performance.

INVESTMENT EXPERTISE

OCF Advised Funds are managed by a professional investment manager with extensive experience in the investment industry. This ensures that your investments are managed by a team of experts who are focused on maximizing your returns and minimizing your risk. The investment manager also has access to a wide range of investment opportunities and resources, which allows them to make informed investment decisions on your behalf.

DIRECT PARTICIPATION

OCF Advised Funds are managed by a professional investment manager, but you have the ability to interact directly with the investment manager. This allows you to discuss your investment goals and preferences, and to receive personalized advice and guidance from the investment manager. You can also request to meet with the investment manager to discuss your investment strategy and to review your investment performance.

ENSURED LEGACY

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Learning Opportunities for Advised Fund Donors



Visit a nonprofit organization in which you have an interest



Learn the fundamentals of grantmaking



Attend OCF-hosted events where you can meet other OCF donors and learn about critical issues regionally and statewide



Consult OCF staff for advice about specific grantmaking strategies



Learn about linking your fund to your estate plan so you can make a charitable gift through your will or trust



Develop a family philanthropy program

**FOR AN UP-TO-DATE LIST OF EVENTS AND
LEARNING OPPORTUNITIES, VISIT:**

OREGONCF.ORG

Frequently Asked Questions

WHAT IS THE MINIMUM CONTRIBUTION NEEDED TO SET UP A DONOR ADVISED FUND?

There is no minimum contribution needed to set up a donor advised fund. However, there is a minimum contribution of \$100 needed to make a grant from the fund.

HOW DO I RECOMMEND GRANTS FROM MY ADVISED FUND?

Grants are recommended by completing a grant recommendation form, which is available on the OCF website. The form can be found under the "Grants" tab in the "Donor Resources" section.

IS THERE A MINIMUM GRANT AMOUNT?

There is a minimum grant amount of \$100. Grants of less than \$100 are not eligible for a grant recommendation form.

HOW OFTEN CAN I CONTRIBUTE TO MY ADVISED FUND?

There is no limit on the number of contributions you can make to your donor advised fund.

MAY I RECOMMEND A GRANT TO AN ORGANIZATION OUTSIDE OF OREGON?

Yes, you may recommend a grant to an organization outside of Oregon. However, the organization must be a 501(c)(3) nonprofit organization and must be eligible to receive grants from OCF.

MAY I RECOMMEND A GRANT TO AN ORGANIZATION OUTSIDE THE UNITED STATES?

No, you may not recommend a grant to an organization outside the United States.

MAY I RECOMMEND A GRANT TO AN INDIVIDUAL?

No, you may not recommend a grant to an individual. Grants are only made to 501(c)(3) nonprofit organizations.

CAN I FULFILL A PLEDGE THROUGH MY ADVISED FUND OR RECEIVE ANY BENEFIT AS A RESULT OF MY GRANT?

No, you may not fulfill a pledge through your donor advised fund or receive any benefit as a result of your grant. Grants are made to 501(c)(3) nonprofit organizations and are not tax-deductible.

CAN I REMAIN ANONYMOUS TO A GRANT RECIPIENT?

Yes, you may remain anonymous to a grant recipient. However, you must indicate your preference on the grant recommendation form.

WHAT FEES DOES OCF CHARGE?

OCF does not charge any fees for the establishment or maintenance of a donor advised fund. However, there are some administrative costs associated with the fund, which are covered by the fund's assets.

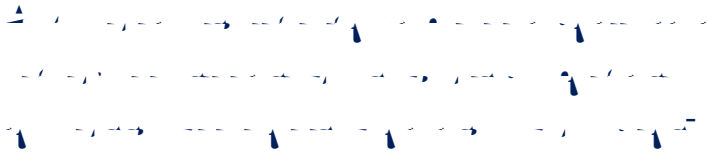
HOW MUCH CAN I GRANT EACH YEAR?

There is no limit on the amount of grants you can make from your donor advised fund each year. However, the total amount of grants made from the fund cannot exceed the total assets of the fund.

DOES MY FUND HAVE TO BE ENDOWED?

No, your donor advised fund does not have to be endowed. You may make grants from the fund as long as there are assets available to do so.

The mission of Oregon Community Foundation is to improve lives for all Oregonians through the power of philanthropy.



Get Started

CALL

YOUR LOCAL OCF OFFICE

VISIT

OREGONCF.ORG

EMAIL

GIFTPLANNING@OREGONCF.ORG

BEND

(541) 382-1170

EUGENE

(541) 431-7099

MEDFORD

(541) 773-8987

PORTLAND

(503) 227-6846

SALEM

(503) 779-1927

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