



DONOR ADVISED FUNDS

A personal approach to giving.

Convenient. Personal. Flexible.

When you establish a Donor Advised Fund, you make ongoing suggestions for how grants from that fund are used to improve life in our community.

WHY OPEN A DONOR ADVISED FUND

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.

A PERSONAL CONNECTION

"We are founding members of the Community Foundation and have found it to be an efficient, flexible way to give back.

We love that we can name successor advisor(s) to serve in our place after our death and fully acquaint them with our charitable intentions.

At the Community Foundation, we can join with others to fund a project or we can Individually fund a project we think has merit."

Doug & Ann Larson
Douglas & Ann Larson Family Fund



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BY THE NUMBERS

\$7.6M Total Net Assets

145 Total Funds Held

15 Donor Advised Funds

\$560,044 Donor Advised Assets

JOIN US

Let us help you
realize your
philanthropic vision.

CLICK

www.cfdunncounty.org

CONTACT



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HOW IT WORKS

- You make a gift to the Community Foundation of Dunn County—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.
- You receive tax benefits in the year your 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 community foundation board 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).
- Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.



OUR MISSION

We are a permanent savings and investment account for Dunn County. From this, we offer strategic grants to respond to local needs. This money grows from contributions from people just like you. We make it possible for anyone to create a legacy.

Our mission is to connect people who care with causes that matter to enrich the quality of life in Dunn County, now and for future generations.

For Good. Forever.