



Your Donor Advised Fund Overview

[YOUR FUND NAME] AT INFaITH COMMUNITY FOUNDATION

Date fund created: [Date]

Donor/fund advisor(s): [Fund advisor name(s)]

Successor advisor(s): [Successor advisor name(s)]

Welcome to giving through InFaith Community Foundation and to your role as successor advisor.

Donor advised funds—like [your fund name]—were created to live out faith, values and life experiences through giving. Many donor advised funds are designed to be passed on from one generation to the next.

Whether you’re an initial fund advisor or successor advisor, you are part of a vibrant community of generosity, where together we are spreading joy and changing lives in amazing ways.

Why was [your fund name] created?

[The intent of your fund is encapsulated here – provided to InFaith by donor/advisor (You may already have this done if you completed InFaith’s resource called: Your Giving Goals - An Easy Way to Get Started)]

[If you do not have a specific reason this fund was created, we will insert this blurb.]

This donor advised fund was created to reflect a person’s or family’s beliefs and values in a sustainable way. Its intent is to continue to positively change lives and influence our shared community for generations to come, supporting the causes and charities of importance to the fund advisor.

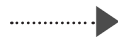
How does a donor advised fund work?

There are three components to your donor advised fund – Give, Grow & Grant – all working together to achieve your charitable goals.



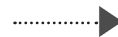
GIVE

Receive maximum tax benefits based upon when and how you give. The breadth of giving options range from simple to complex.



GROW

Select a custom investment allocation for your gift assets. Investment earnings and appreciation are reinvested into your fund. Make additional gifts to enhance your giving.



GRANT

Grant to charities and causes that mean the most to you at times of your choosing.

(continued, over)

Where can I learn more about this fund?

The following document(s) contain more information on this fund:

Please note names of resources have changed over time and your document may differ from what is listed.

- Fund Agreement.** This is the formal document for a fund stipulating what the fund is and how it should work. The other elements give color and nuance to this document.
- Your Giving Goals: An Easy Way to Get Started.** *This quick starting point is a good way to start thinking about your giving values and can serve as a scratchpad for “Set Your Course Well: Your InFaith Giving Plan,” a more in-depth workbook.*
- Your InFaith Giving Plan: Set Your Course Well.** This short workbook asks questions that are helpful for the donors and extremely valuable for those working on donors’ behalf, such as InFaith and future advisors to the fund.
- Your Giving Story: A Letter to the Future.** This puts the intent of the fund in the format of a letter to future advisors of the fund with the purpose of making it easier for the recipient to understand.

Your Giving Goals, Your Giving Plan and Your Giving Story are important tools available to you. Use them to update and clarify your vision for giving. Whether you’re a current fund advisor or successor advisor, you can complete these individually or in conversation with others. You can download these resources online at inFaithFound.org/GenerationsGive, or contact InFaith to request copies.

What’s my role as successor advisor?

Successor advisors are next in line to help guide charitable giving of a donor advised fund. A successor advisor assumes the role of fund advisor when the original fund advisor is no longer living; this means successor advisors can recommend grants to charities, select the investment allocation for charitable assets and name future successor advisor(s).

With the goal of “generosity with intent,” InFaith provides resources to help successor advisors understand the donor advised fund they’re inheriting. There are many ways charitable funds work—from involving other generations in the conversation to meeting current needs of specific organizations. When you become the fund advisor, InFaith staff is here to help you determine the opportunities and level of involvement that works best for you.

Questions?

We’re here to serve you. To speak with a donor service advisor, contact InFaith at 1-800-365-4172 or email grants@inFaithFound.org.



Spreading Joy. Changing Lives.

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor’s charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit inFaithFound.org.

WE OFFER

- Donor advised funds, giving circles, collaborative funds and organizational endowments
- Full range of giving options, from simple to complex
- Flexibility to give to any charity
- Maximum tax benefits based on when and how you give
- Donor-centered services including online access and family giving resources
- Mission-based investments for charitable assets