

YOUR VALUES. YOUR GIVING.

## CHARITABLE FUND OPTIONS AT INFaITH

A charitable fund at InFaith Community Foundation provides a flexible and effective way to support your favorite charities and causes. Put your plans in place now and give when it's right for you. Whatever path you choose, you will set in motion a lasting legacy to spread joy and change lives throughout our shared community.

### HOW IT WORKS



#### GIVE

Give Now, Give Later, or Give & Receive, with maximum tax benefits based on when and how you give.



#### GROW

Grow your charitable fund through sound stewardship.



#### GRANT

Grant to your favorite charities and causes.

### YOUR CHARITABLE FUND OPTIONS

#### ADVISE GRANTS AS YOU GO DONOR ADVISED FUND

Select a custom investment allocation for your gift assets. Choose from four portfolios — Core Growth, Mission Growth, WomenInvest inFaith and Income — or allocate assets across multiple portfolios. All investment earnings are reinvested to grow your charitable fund.

#### NON-ADVISED FUND OR DESIGNATED FUND MAKING AUTOMATIC ANNUAL GRANTS

Select from one of three investment portfolios — Core Growth, Mission Growth or WomenInvest inFaith. All investment earnings and appreciation are reinvested to grow your charitable fund.

Grant \$100 or more to any IRS-qualified charity at times of your choosing. Include family or friends in your giving decisions and name successor advisors if you wish.

*Minimum: There is no fund minimum; minimum administrative fees apply.*

Designate any IRS-qualified charities to receive automatic annual grants. *Minimum: \$5,000 for each designated charity.*

5% of your fund's value is distributed annually among designated charities in perpetuity; or 10% for 10, 15 or 20 years.

Create a scholarship fund by designating any college, university or seminary, and recommend scholarship criteria. *Minimum: \$5,000 per accredited educational institution.*

Support a specific cause or charitable interest by creating your own Field of Interest Fund. *Minimum: \$25,000.*

*Optional:* Request an immediate, one-time grant to selected charities — \$50,000 or 20% of your gift, whichever is greater, must remain in your charitable fund.

*For non-advised funds:* Designate any IRS-qualified charities to receive automatic annual grants. Your charitable recommendations remain in place for the life of your charitable fund with no additional donor advisement. *Minimum: \$5,000 per named charity.*

### GIVING FLEXIBILITY

- Grants can be designated for general operating support or a specific project.
- Make grants in your name, in honor or memory of a loved one, or anonymously.
- Bypass administrative burdens associated with establishing and maintaining a private foundation. There are no legal fees associated with creating your charitable fund at InFaith.
- Monitor your giving through ongoing statements and online access.
- Include InFaith Collaborative Funds in your giving if you wish.

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## MAKE THE MOST OF YOUR GIVING

InFaith Community Foundation staff is here to serve you throughout the giving process. Consider these services to help reach your giving goals:

- Create or refine your giving goals
- Research charities that align with your charitable goals and values
- Verify charities eligible to receive support from your fund
- Learn how to recommend new grants from your fund, check the status of a grant request or request that a grant be expedited\*
- Update your Fund Agreement with new charities, advisors or contingent charities\*
- Follow-up with charities on how grant support was used
- Discuss unique grantmaking scenarios (e.g., international grants)
- Make additional gifts to your charitable fund

\*Not available for non-advised charitable funds.

## FOR MORE INFORMATION

For more information, please call InFaith Community Foundation at 800-365-4172 or visit [inFaithFound.org](http://inFaithFound.org).

There is no fee charged to establish your charitable fund. Once gift assets are received to your charitable fund, an annual fee equal to 1% is assessed to charitable fund assets on a quarterly basis to cover program and administrative expenses. This fee is based on the fund's average daily balance for the quarter. Charitable fund assets in excess of \$1,000,000 are assessed a reduced fee of .5%, and additional reductions occur with assets exceeding \$5,000,000. Fees are assessed on a per fund basis and are subject to change. Contact InFaith for additional information.

If you establish a charitable fund where grants are advised at times of your choosing (i.e., "Advise as You Go"), a minimum \$25 quarterly administrative fee is assessed when the charitable fund value drops below \$10,000. There may be additional fees for gifts of illiquid assets (e.g., real estate, closely-held stock, life insurance). Contact InFaith Community Foundation for additional information. There may be additional fees for gifts of illiquid assets (e.g., real estate, closely-held stock, life insurance).

If you are 70½ or older, you may create a non-advised charitable fund with gifts of qualified charitable distributions from an IRA. Contact InFaith Community Foundation for more information.

InFaith Community Foundation also offers Advisor Managed Funds for customized portfolios of \$250,000 or more. Contact InFaith Community Foundation for more information.

*InFaith Community Foundation does not provide legal, accounting, or tax advice. Consult your attorney or tax professional. To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.*



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 to charities serving local, national and global communities. To learn more, visit [inFaithFound.org](http://inFaithFound.org).

### WE OFFER

- Donor advised funds, giving circles, collaborative funds and organizational endowments
- A 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

