

## Support Favorite Charities Through InFaith

# YOUR CHARITABLE FUND OPTIONS

A charitable fund at InFaith Community Foundation provides a flexible and effective way to support your favorite charities and causes. Whatever path you choose, you will set in motion a lasting legacy to spread joy and change lives throughout our shared community.

### GIVING FLEXIBILITY

- Give when it's right for you and provide immediate or long-term charitable support.
- Support one or more IRS-qualified charities of your choosing.
- Designate your support for a charity's general operating support or for a specific project.
- Make grants in your name, in honor or memory of a loved one, or anonymously.
- Include family or friends in your giving decisions. Monitor your giving through ongoing statements and online access.
- Bypass administrative burdens associated with establishing and maintaining a private foundation. There are no legal fees associated with creating your charitable fund at InFaith.
- Include InFaith Collaborative Funds in your giving if you wish.

### HOW IT WORKS

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



#### GIVE

Give in ways that are right for you with maximum tax benefits.



#### GROW

Grow your charitable fund through sound stewardship.



#### GRANT

Grant to your favorite charities and causes when and how you wish.

## YOUR CHARITABLE FUND OPTIONS

### GIVE

**Donor Advised Fund**  
Advise As You Go

### GROW

Choose how your fund's charitable assets are invested. Select one InFaith portfolio or allocate assets across multiple portfolios to achieve the mix that aligns with your grantmaking timeline and personal risk temperament. Investment earnings are reinvested to grow your charitable fund.

### GRANT

Grant \$100 or more to any IRS-qualified charity at times of your choosing.  
Name successor advisors if you wish.  
*Minimum: No fund minimum; minimum administrative fees apply to charitable funds with a value of \$10,000 or less.*

### Designated Fund

Annual Grants to Charities

Choose how your fund's charitable assets are invested. Select one InFaith portfolio or allocate assets across multiple portfolios for long-term growth. Investment earnings are reinvested to grow your charitable fund.

Designate any IRS-qualified charities to receive automatic annual grants. You can change your designated charities at any time.

Grant a percent of your fund's value. Five percent of your fund's value is distributed annually among designated charities in perpetuity, or 10% for 10, 15 or 20 years. *Minimum: \$5,000 for each charity.*

Create a scholarship fund by designating any college, university or seminary, and recommend scholarship criteria for recipients. *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.

*continued on back*

---

## GIVE

**Designated  
Non-Advised  
Charitable Fund**  
for gifts of qualified  
charitable distributions  
(QCDs)

## GROW

Choose how your fund's charitable assets are invested. Select one InFaith growth portfolio or allocate assets across multiple growth portfolios. Investment earnings are reinvested to grow your charitable fund.

## GRANT

Designate any IRS-qualified charities to receive automatic annual grants. *Minimum: \$5,000 for each named charity.* These charities must remain unchanged for the life of the fund.

---

## 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).

---

*A 1% annual administrative fee is assessed to cover program expenses. "Advise as You Go" donor advised funds with a value of less than \$10,000 are assessed a minimum \$25 quarterly administrative fee. There may be additional fees for gifts of illiquid assets (e.g., real estate, closely-held stock, life insurance). Contact InFaith for additional information.*

*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.*

*Charitable giving can result in significant tax, legal and financial consequences. Because InFaith Community Foundation cannot give tax or legal advice, you are strongly encouraged to consult with your personal tax and legal advisors.*

*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 annually 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.
- Full range of giving options, from simple to complex.
- Flexibility to give to any charity.
- Maximum tax benefits based on when and how charitable gifts are made.
- Donor-centered services including online access and family and women's giving resources.
- Mission-based investments for charitable assets.