

Donor Advised Fund

connecting people who care with causes that matter



Why choose a Donor Advised Fund?

- Donor Advised Funds (DAFs) make charitable giving easy, effective, and enduring.
- DAFs offer a flexible, convenient, and cost-effective way to organize your giving.
- You can make a tax-deductible gift to a DAF today, and then recommend grants to specific nonprofits on your own timetable - and the Foundation will handle the rest.
- Our extensive relationships with local nonprofits can help you make meaningful connections with charitable organizations.
- DAFs open with a minimum of \$10,000.

Benefits of a Donor Advised Fund

- Charitable funds are invested with our partners at the Baton Rouge Area Foundation and Northshore Community Foundation and are actively managed by highly-rated money managers, JP Morgan and Goldman Sachs.
- Donors with a fund balance greater than \$250,000 may choose to have their DAF invested with their local financial advisor.
- You have the opportunity to name the fund which can be in honor of someone or something special to you.
- Funds managed in the investment portfolio have management fees that currently average 0.85%. Funds in the money market average 0.2%.
- Funds support the overall work of the Foundation with a 1% fee on the average daily balance of the fund.
- Donors also have the opportunity to become members of the Foundation by making an annual contribution. Members help us make a positive, lasting impact in Southwest Louisiana!



GIVE

Make a contribution at any time and receive a tax benefit.



GROW

Your fund is invested and grows tax-free. **ROI 2022: -12.05%**
ROI YTD 2023: 3.46%



GRANT

Advise grants to support causes that matter to you.

Donor Advised Funds are ideal for:

- Donors who wish to remain active in their giving, without the paperwork.
- Donors who want the flexibility of recommending the organizations they wish to support or partnering with donors among the Foundation to support high-impact civic projects.
- Individuals who wish to involve future generations of their family in their philanthropy!

If a Donor Advised Fund may be a fit for you, please contact:

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