

Charitable Giving Options

Fund Type	Direct Gift	Named Unrestricted Fund	Designated Fund	Field of Interest Fund	Donor Advised Fund	Donor Advised Individually Managed Fund
Involvement and Control	You give a gift directly to a public charity. Control is limited to initial gift decision	Endowed gift to Community Needs Fund; CF awards grants	Endowed gift to benefit a specific organization; CF awards grants	Endowed gift for a specific cause; CF awards grants	Endowed gift, Donor recommends grantmaking; CF support	Endowed gift, Donor recommends grantmaking; CF support; Recommends Investment
Tax status Deductibility	Public Charity	Public Charity	Public Charity	Public Charity	Public Charity	Public Charity
Type of Gifts	Cash, and depending on sophistication of nonprofit, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, Bunching large gift in one tax year and grant over many years	Cash, Appreciated Stock, Real Estate, Closely Held Stock, Bunching large gift in one tax year and grant over many years
Grantmaking Support	Your decision is based on your own research, relationship and intuition, gifts are not typically endowed and usually spent immediately	Professional CF staff utilizes our Grant Committee for input on community needs, to recommend grants & verify nonprofit status	Professional CF staff annually grants to identified nonprofit & verify nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verify nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verify nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verify nonprofit status
Startup Gift Size	Any gift size is appropriate	Minimum of \$5,000 endowment	Minimum of \$20,000 endowment	Minimum of \$20,000 endowment	Minimum of \$10,000 with \$5,000 endowed	Minimum of \$250,000 endowment
Admin Service Fee	N/A	1%	1%	1.6%	1.6%	1%
Investment Fee	N/A	.5%	.5%	.5%	.5%	You negotiate with your Investment Advisor
Admin Requirements	N/A	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. Investment Advisor required to submit quarterly statements. CF handles reporting