

Donor Events and Funding Opportunities

Throughout the year, we offer special opportunities to share information with fundholders about the organizations working to address the changing needs of our community.

Behind the Scenes Events

These educational and fun events offer donors an exclusive look at nonprofits who are making an impact in Eastern Jackson County and the surrounding communities. Behind the Scenes events help Community Foundation donors learn about the needs of our region and provide an opportunity for you to connect with leadership and support their work.

Competitive Grants Program

Each year, the Community Foundation awards grants to nonprofit organization through its competitive grants program. As a Donor Advised Fundholder, you have two special opportunities to contribute to the impact of Truman Heartland's annual grants cycle and help local nonprofits.

1. Request a grant from your Donor Advised Fund to add to the Community Foundation's grantmaking budget. The Grants Committee will decide the most deserving programs to fund with your contribution.
2. Support proposals that fit your charitable goals. If you prefer to decide exactly which programs to support, you can help fund projects that the Community Foundation is unable to fully fund. Director of Grantmaking and Donor Services can share information with you regarding these awards and how you can help fill the gap in funding while supporting the causes your care about most.

Succession Planning: Share Your Legacy

Increase the impact of your philanthropy from generation to generation and ensure your legacy endures throughout the life of your fund. We encourage you to name successor advisors for your fund. There is no limit to the number of generations of successor advisors your fund may have, as long as your successors remain active. Additionally, many include their Donor Advised Fund in their estate plans. You can designate your fund to benefit one or more organizations or identify an area of interest. Contact us today to share your plans.



Questions about your Donor Advised Fund?

Please contact:
Diana Castillo,
Director of Grantmaking
and Donor Services

EMAIL castillo@thcf.org

PHONE 816-912-4184



Private Giving—Public Good

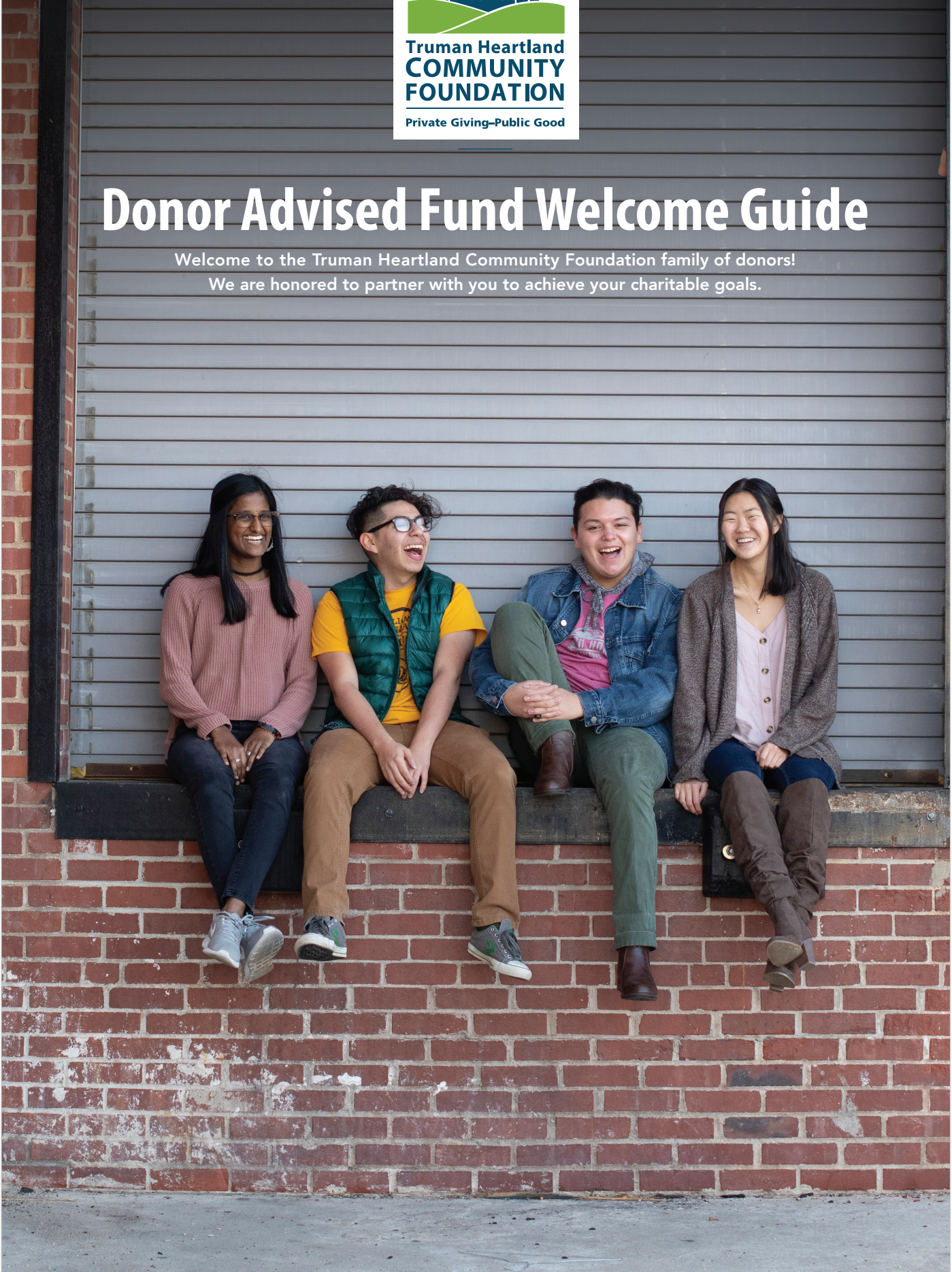
4200 Little Blue Pkwy.
Suite 340
Independence, MO 64057
PHONE 816-836-8189
FAX 816-836-8898
WWW.THCF.ORG



Private Giving—Public Good

Donor Advised Fund Welcome Guide

Welcome to the Truman Heartland Community Foundation family of donors!
We are honored to partner with you to achieve your charitable goals.



Using Your Donor Advised Fund

Your Donor Advised Fund can help you become strategic in your giving and receive tax benefits while your investments have the opportunity to grow, allowing you to maximize your impact on the causes you care about.

What organizations can receive grants from my fund? Nonprofit 501(c)(3) public charities, religious institutions, and entities of government (animal shelters, parks and recreations departments, school districts, etc.) may all receive grants from donor advised funds.

Internal Revenue Service (IRS) regulations prohibit grants to individuals and for-profit entities.

In order to ensure that all grants meet IRS guidelines, the Community Foundation staff will verify the nonprofit status of every organization before awarding a grant and contact you if there is a problem with a grant recommendation you have made.

Who can make grant recommendations from my fund? Only the advisors who signed the original agreement may make recommendations from your fund, unless we are informed otherwise by the donor in writing. For example, if you want your children to be able to recommend grants, send us a letter to that effect.

How often and when may I make distributions from my fund? Grant recommendations can be made at any time. Please allow 7 to 10 business days for the Community Foundation to process your grant recommendation and send the check. As a nationally-accredited Community Foundation, we have multiple approvals and due diligence that must take place before a grant check can be sent.

Is there a minimum grant amount? Yes. Grants may be given for any amount, beginning at the minimum of \$50.

May I recommend a recurring grant from my fund? Yes. At the time of your recommendation, please indicate that you wish the grant to be recurring and specify the timeframe (for example, indicate that you want the grant to recur monthly for 12 months). Community Foundation staff will administer the distribution and payment schedule.

May I recommend grants to organizations outside of our area? Yes! While Truman Heartland focuses its work in Eastern Jackson County and the surrounding communities, you may make grant recommendations to any nonprofit, religious institution, or entity of government in the United States.

For grant requests to organizations outside the United States, Community Foundation staff will search for a domestic charity that supports the work of the international organization. If no domestic charity supporting the work of the international organization can be found, the Community Foundation may work with an agency that specializes in making international grants. These organizations typically assess fees of at least five percent of the amount of the grant, and these additional fees will be assessed against your fund balance.

May I recommend grants from my fund to pay membership dues or attend a fundraising event? No. Donor Advised Fund assets are 100 percent charitable (gifts received by the Foundation receive the maximum tax advantages allowed by federal tax law), and no part of a grant may be used to pay for any tangible benefit such as event tickets. Our grant request form indicates that the donor does not wish to receive any benefit for the grant.

May I pay pledges from my fund? No. You may not pay a pre-existing, legally binding pledge or a capital campaign pledge from your fund. Paying such a pledge from a Donor Advised Fund may result in a private benefit not permitted under IRS regulations. If you would like to support a capital campaign with a pledge or enter into a legally binding pledge, please call the Director of Grantmaking and Donor Services before discussing the pledge with the organization. There are a number of simple methods of fulfilling your philanthropic objectives through advanced planning with the Community Foundation.

Can I make grants anonymously? Yes. You may request that individual grants be made anonymously by indicating your wish on the grant recommendation form.

You may also request that your fund always make grants anonymously. Please contact the Director of Grantmaking and Donor Services if you would like your fund to remain anonymous.

How often must I use my fund? We encourage you to utilize your fund regularly by recommending grants to nonprofit organizations. If there is no activity from a fund for a period of at least five years and the donor has not responded to regular, periodic communication from the Community Foundation about utilizing the fund, the Community Foundation may take steps to deactivate the fund. These steps may include making grants from the fund to nonprofits that align with the donor's original intent.

Growing Your Donor Advised Fund

As your philanthropic interests grow, increasing your fund will allow you to enhance your giving plan and build a lasting legacy.



By Check

Please make the check out to: Truman Heartland Community Foundation Include your fund's name in the memo line. Mail to:
**4200 Little Blue Parkway
Suite 340
Independence, MO 64057**



By Credit or Debit Card

Visit www.thcf.org/donate, search for your fund and complete the donation form. You can also click on the "Donate" tab in your donor portal and complete the donation form. Please note that all credit and debit card transactions incur a merchant processing fee of 2 to 4 percent. These fees will be deducted from the fund you are supporting. Truman Heartland Community Foundation receives no portion of these fees.



Appreciated Assets (publicly traded stock, closely held stock, real estate)

Please contact the Director of Grantmaking and Donor Services to receive information about how to donate appreciated assets.



Matching Gifts

Since the Community Foundation is a 501(c)(3) nonprofit organization, your contribution may be eligible for a matching gift from your company. Please see your company representative for details.

Making Grants from Your Donor Advised Fund

The joy of giving should be easy! Here are three ways to recommend grants from your fund:

1 Online through our donor portal by visiting www.thcf.org and click on "Donor Login" at the bottom of the page.

2 Complete and mail or email a Grant Recommendation Form or the details it contains to the Director of Grantmaking and Donor Services.

3 Call the Director of Grantmaking and Donor Services. She will work with you to get a written request submitted however is easiest for you.



Diana Castillo
Director of Grantmaking and Donor Services
EMAIL castillo@thcf.org
PHONE 816-912-4184