



# ESTABLISHING A Donor Advised Fund

## 1

Type of  
Gifts



CASH



STOCKS



OTHER ASSETS

**Determine the type of gift** you will make (initial gift of \$5,000 or more). This can be a gift of cash, stock, or an other asset.

## 2

Name Your  
Fund



**Determine the name you want to give your fund** (perhaps the name of your business or your family) and decide any colleagues or family members you'd like to involve in giving either as a successor advisor or additional advisors.

## 3

Donor Advised  
Fund



**The foundation will draft the donor advised fund documents** to create your personal foundation. A sample document is available at [thcf.org](http://thcf.org) in our advisor resources section.

## 4

Grant Your  
Causes



FAVORITE CAUSES



RELIGIOUS INSTITUTIONS



HUMAN SERVICES

**Identify what types of causes you're passionate about supporting and make grants out of your fund to support them.** If you need help, Your community foundation staff can share some opportunities that may pique your interests.



# INVESTMENT OPTIONS

## to meet your goals

THCF offers **flexibility** to customize your fund's investments to meet your charitable goals, whether immediate or long-term. There are two ways for donors to participate: you can **select your financial advisor** or manage your fund, OR you can **select your own investment** mix using the community foundation's investment pool.

### ☐ **OPTION 1: Select your financial advisor to manage your charitable fund**

With this option, you can benefit from customized **investment management by an advisor** you already know and trust. If this option is right for you, simply put us in touch with your financial advisor and **our team will take care of the rest!** A segregated fund will be managed directly by your advisor, investing your charitable dollars in accordance with THCF's most current investment policies and standards.

### ☐ **OPTION 2: Select the community foundation's investment pool**

This second option allows you to select to invest the assets of your charitable fund in the community foundation's investment pool. The responsibility for managing the foundation's investment program is vested in our **Board of Directors through our Investment Committee**. The committee works closely with staff and investment advisors to set policy, establish performance benchmarks, and monitor performance.

### ☐ **Select your investment strategy**

If you select the community foundation's investment pool, you are able to match your risk tolerance and the long-term objectives for your fund. You can select an existing mix or create your own.

- ☐ **Long-term mix:** Recommended Mix
- ☐ **Risk averse mix:** 100% money market and CD pool
- ☐ **Create your own mix:** Select your percentage of money market, fixed income, and equity pools to match your fund's goals and risk tolerance.

