



# Ways to Give Through and to Your Charitable Fund

## Charitable Giving Options with The Dayton Foundation

Whether you want to organize your giving, continue to support your favorite causes annually or create a lasting legacy for yourself or family, The Dayton Foundation can help you realize your charitable giving goals.



### Choose a Charitable Fund That Is Right for You

From long-term endowment funds to private foundation alternatives, The Dayton Foundation offers an array of options with the degree of involvement and recognition (or anonymity) you desire in awarding grants to charity. We are happy to review the following long- and short-term fund options with you and/or your financial or estate advisor. Our knowledgeable staff can help in customizing a giving plan that fits your charitable wishes and financial goals.

### Donor-Advised Giving Options

If you wish to be actively involved in the distribution of your gifts by making periodic grant recommendations to support organizations and activities that are of interest to you, one of the following donor-advised giving options might be a fit for you.

🔹 **Charitable Checking Account.**<sup>SM</sup> You may deposit cash or appreciated assets into your account when it's most advantageous for you and then direct us to make grants to any IRS-approved charity anywhere in the U.S. and internationally. The Dayton Foundation does all the work, including sending grants and provid-

ing record keeping to give you additional tax advantages. A unique advantage of this free service is that you can open your account online, and there is no minimum balance.

🔹 **Donor-Advised Fund.** These funds offer many of the same benefits of the Charitable Checking Account Service, but are invested to allow for growth over time. You may choose from a list of local advisors or, in some cases, your own advisor may continue managing the fund's assets. Other benefits include access to our knowledgeable Donor Services staff, who can advise you of grantmaking opportunities in the community, and to Donor Express, our secure online service.

### Giving Options for Collective Community Good

If you would like to multiply the effect of your gift and join with others to help The Dayton Foundation address some of Greater Dayton's most pressing issues and opportunities, you may want to consider the following fund options.

🔹 **Community Impact Endowment Fund.** You become part of a greater effort to help the community by giving The Dayton Foundation

the discretion to determine where overall community need is greatest.

👉 **Field-of-Interest Fund.** You identify a particular area of interest, and The Dayton Foundation will award grants from your fund where need is strongest within your interest area.

### **Giving Options that Support Your Passion**

If you are looking for ways to support your favorite nonprofit organizations in perpetuity or encourage education by providing scholarships, The Dayton Foundation offers the following charitable giving options.

👉 **Designated or IRA-Designated Fund.** You designate a favorite charity or charities to receive ongoing support, today and in the future.

👉 **Scholarship Fund.** You may decide the criteria students must meet to receive scholarships from your fund and how the scholarship must be used. The Foundation's staff is available to help you in the process.

### **Alternative to a Private Foundation**

👉 **Family Foundation Plus.<sup>SM</sup>** This type of donor-advised fund offers you all of the advantages of a private foundation, including multigenerational involvement and longevity, without the hassle and expense. You also benefit from being associated with a community foundation, including more favorable tax treatment, increased privacy, and the investment, administrative and charitable giving resources of The Dayton Foundation.

### **Planned and Deferred Gift Options**

We can help you with current giving or assist you in creating a plan for giving after your lifetime, such as naming your fund at the

Foundation in your will or gifting life insurance or retirement plan assets. You also may establish a plan that can provide supplemental income for you or your family, while also supporting your special charitable interests. A number of these gift options can help offset your taxable income today as well.

### **Ways You Can Fund Your Charitable Gift**

The Dayton Foundation offers you easy, effective ways to provide lasting support for the charities you care about most. You can give now to your fund or in the future using:

- 👉 Checks or Credit Cards
- 👉 Preauthorized Debit or Bill Pay
- 👉 Appreciated Securities
- 👉 IRA Rollover Assets – Required Minimum Distribution (RMD)
- 👉 Real Estate or Other Tangible Personal Property
- 👉 Legacy Gifts, such as Life Insurance, Bequests, Retirement Assets or Life Estate Remainder Interest
- 👉 Life Income Gift Plans, such as Charitable Gift Annuities, Charitable Remainder Trusts or Charitable Lead Trusts

### **How You Can Learn More**

You or your financial or legal advisor may contact us for more information about any of these current or deferred fund options and about ways you can fund your charitable gift. Call (937) 222-0410 or toll free at (877) 222-0410, and ask to speak to a member of our Development and Donor Services department. You also may visit [daytonfoundation.org](http://daytonfoundation.org). 👉

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### **We're here to help you help others:**

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