

can work with you and your estate-planning advisor to review these and other planning options.

Is There a Fee to Establish Your Fund?

There is no start-up fee, and the Foundation's low, annual administrative costs mean a higher percentage of the returns on your contributions will remain in your fund to benefit your chosen charities.

How Do You Get Started?

Talk to us. We are happy to work with you and your financial or legal advisor to customize a charitable fund that can help you achieve your personal and financial goals. Call (937) 222-0410 or toll free at (877) 222-0410, and ask to speak to one of our Development officers. You also may visit us online at www.daytonfoundation.org.



THE • DAYTON
FOUNDATION

We're here for good.

*The Regional Community
Foundation*

500 Kettering Tower
Dayton, Ohio 45423

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Toll Free: (877) 222-0410
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Sustained Giving to Your Favorite Charities⁵

Donor-Designated Funds



A lasting, effective way to support individual charities through The Dayton Foundation:

- provide a permanent source of income for the organizations you care about
- leave a lasting legacy for you and your family
- benefit from The Dayton Foundation's charitable-giving expertise, professional financial fund management and commitment to stewardship

What Is a Designated Endowment Fund?

A designated fund through The Dayton Foundation offers you a wonderful way to provide ongoing support to the charitable organizations that have touched your life. This fund option is ideal for individuals or families who desire a hassle-free method for fulfilling perpetual support to charities.

Through your fund agreement, you can identify one or more charitable organizations to receive a percentage of your fund's earnings. The Dayton Foundation handles all the administrative details, including issuing grant checks to your designated charities. We also provide you with quarterly and year-end statements of your fund's activity to help you stay connected to your giving.

In addition, when you establish an endowed fund, you benefit from The Dayton Foundation's more than 80 years of charitable-giving experience. Our sound investment stewardship and monitoring services also ensure that your grants will be made to the charitable organizations of your choice long into the future.

Why Establish a Designated Fund, Instead of Giving Directly to Individual Charities?

Endowing your gift through a Dayton Foundation fund enables you to provide a source of continual income for your favorite charities, today and long after your lifetime. As a well-established

The Foundation's sound investment stewardship and monitoring services ensure that your grants will be made to the charitable organizations of your choice for generations to come.

community foundation, The Dayton Foundation can safeguard your fund's principle, preserving your charitable gifts and intent.

Plus, establishing a fund through the Foundation opens the door to a wealth of charitable-giving expertise and the flexibility to give assets (such as appreciated stock or real estate) that some smaller organizations might not be able to receive on their own.

What If Your Designated Charity Goes Out of Business or Changes Its Mission?

You may designate an alternate charity to receive grants from your fund. If you are no longer living, we will identify another organization that most closely matches your charitable intentions.

Can Your Grants Be Made Anonymously?

Yes. We can make your grants anonymously, if requested, or in the name of your fund.

How Much Must You Contribute to Establish a Fund?

Most donors make a commitment to bring their fund to at least \$25,000 in assets, which they can accomplish over a reasonable period of time.

Can Others Contribute to Your Fund?

Others – as well as you – can add to your fund at any time with gifts of cash, appreciated securities, real estate or tangible property. The Dayton Foundation can facilitate even the most complex planned gifts through your estate or make possible charitable gift options that also provide income for life.

Can You Set Up a Fund to Be Established After You Pass Away?

Yes. When you are making important estate-planning decisions, you often think of leaving something to your loved ones. Why not consider a gift of continual financial support for the charities that have meant the most to you during your life? You may designate your fund at The Dayton Foundation as the beneficiary of a bequest of cash, securities, qualified deferred retirement assets, a life insurance policy, a charitable gift annuity or a charitable trust. Our staff

Visit The Dayton Foundation online at www.daytonfoundation.org for other helpful resources.