



We're here for good.

The Regional Community Foundation

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For a listing of The Dayton Foundation's Governing Board members and staff, visit our web site or give us a call.

Please note: The Dayton Foundation does not practice law or offer financial or tax advice. The Foundation recommends that people considering establishing funds or legacies through the Foundation consult their financial, tax or legal advisor.

How to Make the Most of Your Charitable Gifts



Whether you:

- make annual charitable gifts or wish to establish a long-term fund to benefit charity,
- want to give now or through your estate,
- are of modest means or of wealth,
- wish to support schools, social services, art, nature or your community, church or temple,

The Dayton Foundation is the area's leader in helping people find the best way to make a difference.

What Is The Dayton Foundation?

The Dayton Foundation is the Miami Valley's expert in helping caring people accomplish their charitable goals.

- We are a donor-centered, charitable organization, established by and for donors, and dedicated to excellent, responsive and personalized service.
- As a regional community foundation, we manage well over \$200 million in charitable funds for more than 2,700 donors and make tens of millions of dollars in grants to charities each year. We have rigorously administered donors' charitable wishes since 1921 and are among the largest, oldest and most innovative community foundations in the country.

• We are a locally run, not-for-profit organization – 501(c)(3). **Our only business is to foster charitable giving, serve charitable people like you and provide leadership to meet changing needs in the Greater Miami Valley.**

• Many donors have told us that giving money to charity wisely is not easy. Doing this in the most tax-effective manner, while enhancing family financial and estate plans, is our expertise. The Dayton Foundation is the region's most knowledgeable resource in the charitable giving arena and offers the

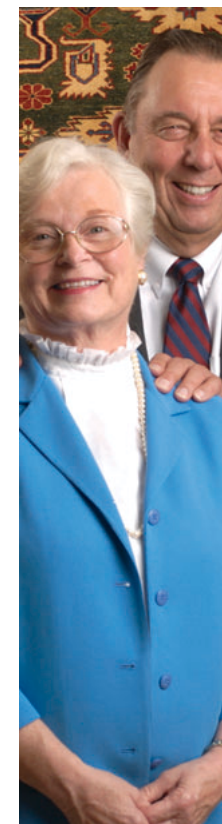
area's most extensive donor service delivery system.

When people have questions about community needs and how to accomplish charitable goals, they turn to The Dayton Foundation to help them find solutions and the best fit for individual circumstances.

Is The Dayton Foundation Right for You?

The Dayton Foundation can help you if you give to charity (or wish to leave a legacy) and want to make the most effective use of your charitable dollars.

► MORE



“By giving through our Dayton Foundation fund to Miami Valley nonprofits, we’ve enhanced our lives and our family’s lives. We’ve gotten more out of this kind of philanthropy than we ever could have imagined.”

– Doris and David Ponitz, Charitable Checking AccountSM and donor-advised endowment fund donors

The Foundation works both with annual givers and with those who wish to establish long-term (endowment) funds or planned and deferred gifts (including gifts that pay income for life).

What Do Donors Say about Their Experience with The Dayton Foundation?

- 99.5% of people responding to a random sample survey describe The Dayton Foundation as a highly respected organization.
- 98% of donors surveyed describe The Dayton Foundation's documentation and accounting of their funds as excellent.
- 95% of donors express satisfaction with the service provided to them by The Dayton Foundation.



"I've worked with many foundations, private and community. I find The Dayton Foundation's professionalism and sensitivity to donors' needs to be exceptional."

– David Thomas III, estate planning lawyer, charitable foundation expert and designated endowment fund donor

What Benefits Can You Expect When You Use The Dayton Foundation?

- **Community knowledge** and community impact
- **Professional staff**, including attorneys, CPAs and grants specialists, to help you and your advisors maximize your charitable dollars and do the most good
- Flexible, individualized, **excellent service**
- Record keeping and quarterly statements to **simplify your charitable giving**, including the option of online giving
- **Maximum tax advantages** as a public charity
- Rigorous institutional commitment to **stewardship** and donor intent, in perpetuity
- Highly rated **fund management**, with annual independent audits of all funds and third-party investment oversight

- Wide **array of giving methods** and ways of funding your gift, including cash, securities, retirement funds, real estate, bequests and others
- Availability of services offering **better alternatives to private foundations**
- **Cost effectiveness**
- **Institutional stability**, with more than 80 years of experience in charitable giving, planning and administration
- Simplicity of process and ability to **give to multiple charities** through one organization
- Option of **secure, password-protected online access** to your fund balance and giving history, as well as online grantmaking
- **Acknowledgment** of your gifts or assurance of **anonymity**, as directed by you



"If you haven't talked to the people at The Dayton Foundation, you should. For me, the Foundation is the best source of information locally on charitable giving, regardless of what you do."

– Peter H. Kuntz, Charitable Checking Account and Supporting Organization donor (The Kuntz Foundation)

- Being part of a philanthropic community of donors in which **you can take pride** and who, together, have a **major impact** upon our region

How Can You Learn If The Dayton Foundation Is Right for You?

It's as simple as a phone call or going online. You may call a member of The Dayton Foundation's development staff at (937) 222-0410 or toll free at (877) 222-0410. You also may visit our web site at www.daytonfoundation.org to read about available donor services, your charitable options and how the Foundation can assist you.



"The Dayton Foundation is a good partner for dreaming good things and then making them happen."

– Martha S. MacDonell, Charitable Checking Account and field-of-interest endowment fund donor



"The Dayton Foundation is a wonderful place to put our funds and help us change the way African-American children grow up."

– Edythe Lewis, field-of-interest endowment fund and legacy donor