



The Dayton
Foundation
We help you help others.

The Regional Community
Foundation

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Confirmed in Compliance with
National Standards for U.S.
Community Foundations



*We help you help others.*SM

If You Make Gifts to Charity, This Is for You!



Charitable Checking AccountSM Service

What Is the Charitable Checking Account Service?

The service offers an easy, convenient and tax-wise vehicle for doing your regular charitable giving. You deposit assets into your account and then request that The Dayton Foundation send contributions (grants) to any IRS-approved U.S. charities you choose, including educational and religious institutions. The Dayton Foundation does the work!

So Why Not Just Give Directly to Charities?

You have opportunities for tax advantages. You can use appreciated assets like stocks or mutual funds to fund your account. You gain the full value of the asset for your charitable purposes, undiminished by long-term capital gains taxes, when you donate the asset to The Dayton Foundation before the asset is sold.

You gain flexibility. You can deposit assets in your account in the tax year when it's most advantageous to you, take the charitable deduction in that year, then distribute funds to your favorite charities then or at a later date.

You can give online, if you choose. Most donors choose to use our secure online service, Donor Express, to advise grants from their Charitable Checking Account. You may obtain daily-updated account information, access your gift history and contribute to your account at any time. You also can open your account online.

You can simplify your record-keeping and tax-reporting process. Your gift acknowledgment from the Foundation is the only one you need for tax purposes for gifts made to and grants made from your account. With

► MORE



The Dayton
Foundation
We help you help others.

Since 1921,
helping people
to help others.

Charitable Checking AccountSM Service – the most tax-wise, convenient way to do your regular charitable giving

- support the charities of your choice locally and around the world
- enjoy increased tax benefits by timing deductions and giving appreciated assets
- save with no fees or fund minimums
- receive just one statement for your tax purposes
- access account information, make secure gifts and grants online, 24/7



“I love the Charitable Checking Account Service, especially because of its simplicity and the ease of giving to multiple charities. I know that the revenue generated by my account is used to help the Foundation’s charitable purpose. Therefore each dollar I put in goes beyond a dollar to help others.”

– Ratna Palakodeti, MD, donor since 2012



“I feel confident recommending the Charitable Checking Account Service to my clients, who will be served in a friendly, professional and can-do manner. My wife and I use the service ourselves. We can check our fund information and direct grants online, donate appreciated securities and receive one statement for tax reporting.”

– Robert J. Suttman, II, CFA, President, Principal and Founding Partner, Eubel Brady & Suttman Asset Management, and donor since 1991

Donor Express, you have real-time access to view your account balance, deposits and charitable grants. The Foundation provides you with an end-of-year statement, detailing all account activity for the year.

✎ **You save time.** The Foundation does the work of mailing or electronically transferring funds to your charities, verifying their IRS status and doing the bookkeeping for you.

✎ **You gain anonymity, if you so choose, or recognition for your gifts.** Grants to charities can be made in your name or anonymously, depending upon your preference.

Is There a Cost for the Service?

It’s free! For every cash dollar you put in, you get to direct a dollar to the charities of your choice. The only charges you may incur for the service are the usual costs involved in liquidating securities or other property (e.g., broker’s fees) that you place in your account or processing fees associated with gifts via credit cards. These charges will be subtracted from your account balance.

Is the Service Right for You?

If you are an individual, family, business or other organization and regularly give to charity, you will find this a convenient, beneficial service. Anyone who gives at any level may participate, since no minimum deposit or balance is required – and there are no maximums either. People and organizations with appreciated property to donate will experience increased tax advantages.

What Do You Have to Lose?

Financial advisors who regularly refer their clients to the Foundation’s Charitable Checking Account Service have told us that they urge individuals and families to “just try it.” If they’re not convinced of the value, they can simply spend out their accounts. Advisors report to us that their clients love the service because it simplifies their charitable giving and they can focus on what really matters, supporting the causes they care about.



“I opened two Charitable Checking Accounts, one for my company and one for my family. I couldn’t be more pleased with the service. I really like how easy it is to contribute appreciated assets to my fund, saving a large amount in capital gains taxes, and donate to multiple charities today or in the future.”

– Al Wofford, President and Founder, CDO Technologies and VT Design Solutions, and donor since 2009

Open a Charitable Checking Account Today

Visit www.daytonfoundation.org to open your account online. If you prefer, you or your financial or legal advisor may 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.



“Our Charitable Checking Account helps us give more efficiently to the organizations we care about, which is core to our family’s mission. We also like that we can make gifts online – even from our smartphone. We enjoy working with the folks at The Dayton Foundation!”

– Maria and Vince Russell, donors since 2007