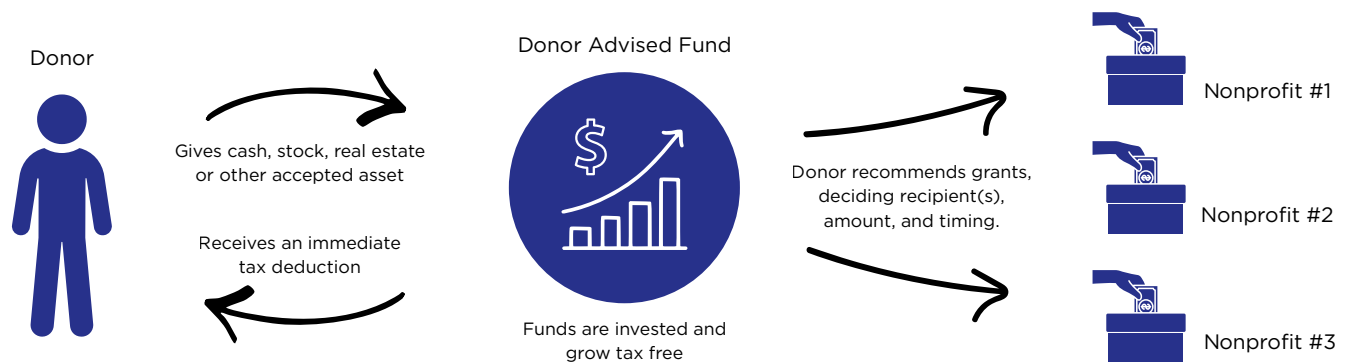


### Flexible, streamlined charitable giving fund

Donor advised funds allow you to make a tax-deductible transfer of cash or marketable securities that is immediately eligible for a charitable deduction. Then, you can recommend gifts to favorite qualified nonprofits from the fund when the time is right.

#### How a Donor Advised Fund Works



#### Accepted Assets

- Cash
- Publicly Traded Securities
- Real Estate
- Life Insurance
- Closely Held Business Interests
- Private Foundation Conversion

#### Key Information

- \$25,000 initial gift; no minimum after
- Complex assets accepted
- Donor maintains advisory privileges
- Donor selects an investment pool for fund
- Fund name and description is completely customizable

#### Fund Features



24/7 access to online fund portal to view fund dashboard and recommend grants to favorite nonprofits



Ability to donate a variety of assets to fund, including highly appreciated stock to reduce capital gains tax

### A Fund at Central Florida Foundation

Establishing a fund at Central Florida Foundation, our region's community foundation since 1994, fuels critical community work. Unlike most large financial institutions, fund expenses at CFF support:

- women and children's issues
  - giving circles
  - social enterprise
  - community planning & collaboration
  - a strong nonprofit community
  - systems-level community investment
- 

### How does Central Florida Foundation help?

Our team of philanthropic professionals will help you to:

- Select a name for your fund, whether your family name or something less specific
  - Create and execute a document that establishes your fund and designates successor advisors, such as your children, to step into your shoes upon your death or incapacity
  - Learn more about the causes you care about and how to make the biggest impact
  - Discover ways to involve your family in your giving
- 



### Contact Us

We welcome the opportunity to talk with you.

Call or text Steven at  
321-966-2588 or by email at [sjerina@cffound.org](mailto:sjerina@cffound.org).

**Steven J. Jerina, MPA, CAP®**

**Vice President of Philanthropic  
Strategies and Partnerships**