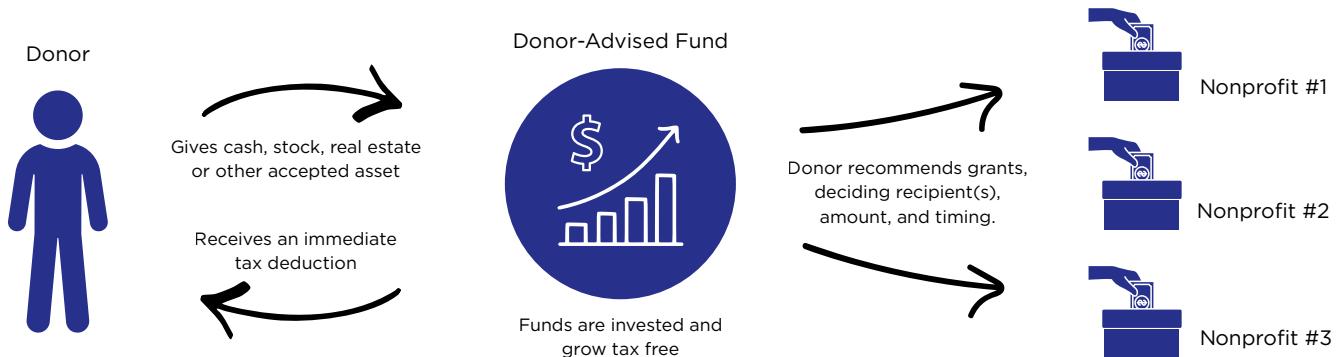


Flexible, streamlined charitable giving fund

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
- female philanthropy
- 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.

Steven J. Jerina, MPA, CAP®

Vice President of Philanthropic
Strategies and Partnerships

